Administrative User Interface

VirtualDoxx User Manual

Prepared for:

Morris County Criminal

Manual Version Number	Date
1	08/15/13

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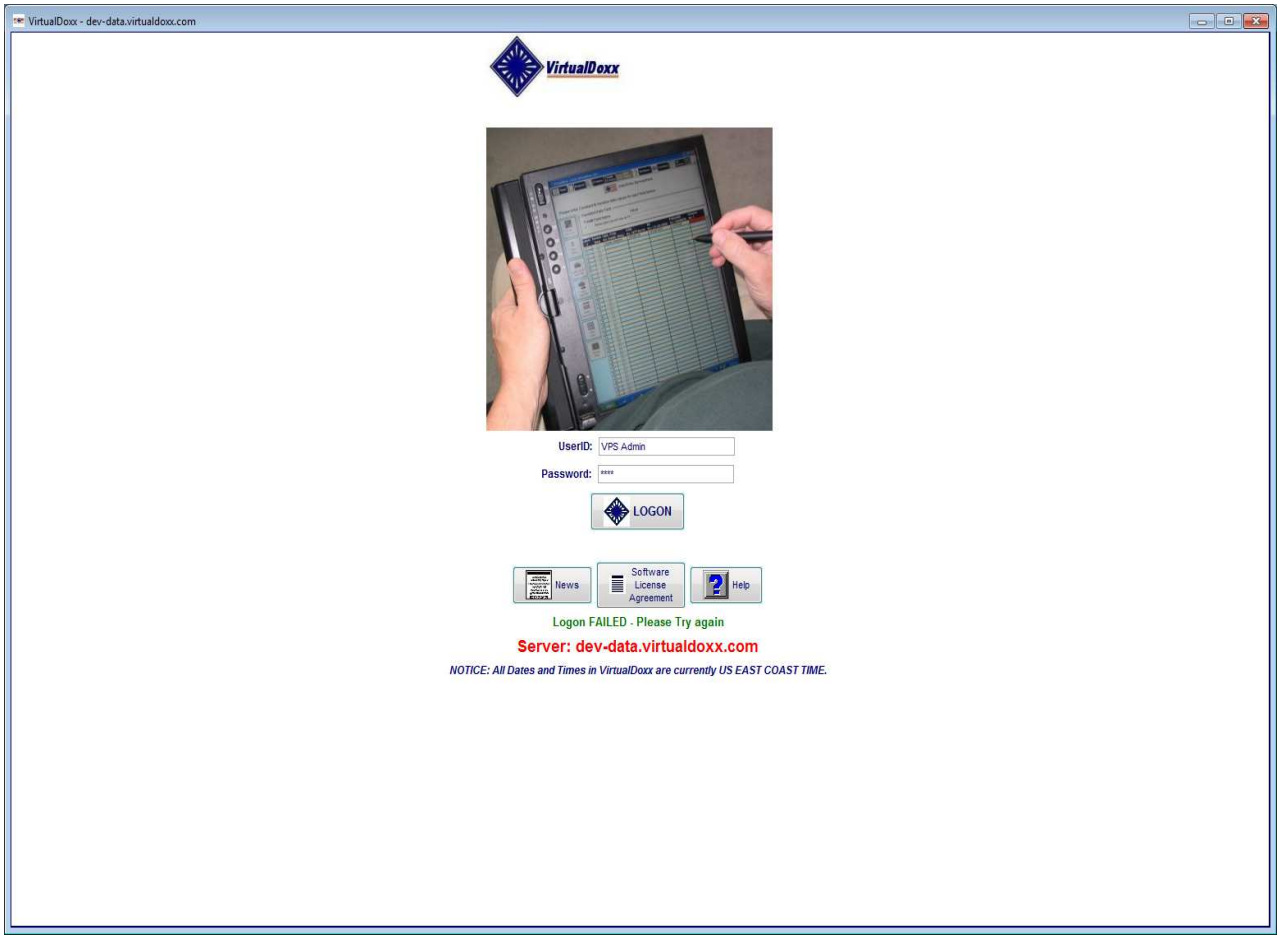
Log In:

After VirtualDoxx has launched you should see the logon screen shown below.

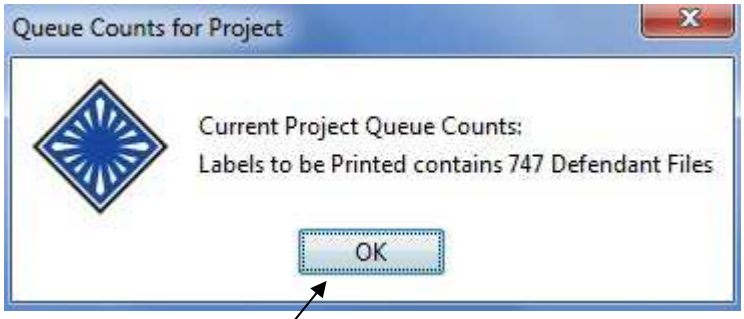


Complete the following steps to login to and begin using VirtualDoxx:

1. Enter your UserID.
2. Enter your Password.
3. Click the LOGON button.

Once a User has logged in, an icon will automatically save to their desktop, and can be used going forward for logging on (so they do not have to go to www.virtualdoxx.com).

Upon Logon, a pop-up message will alert the user of any new records in the “Labels to be Printed Queue”, as well as records in any other queue.



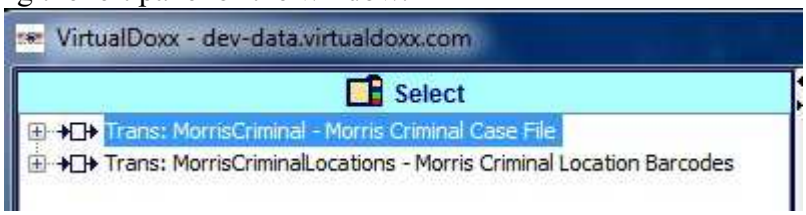
Click the **OK** button to proceed with logon.

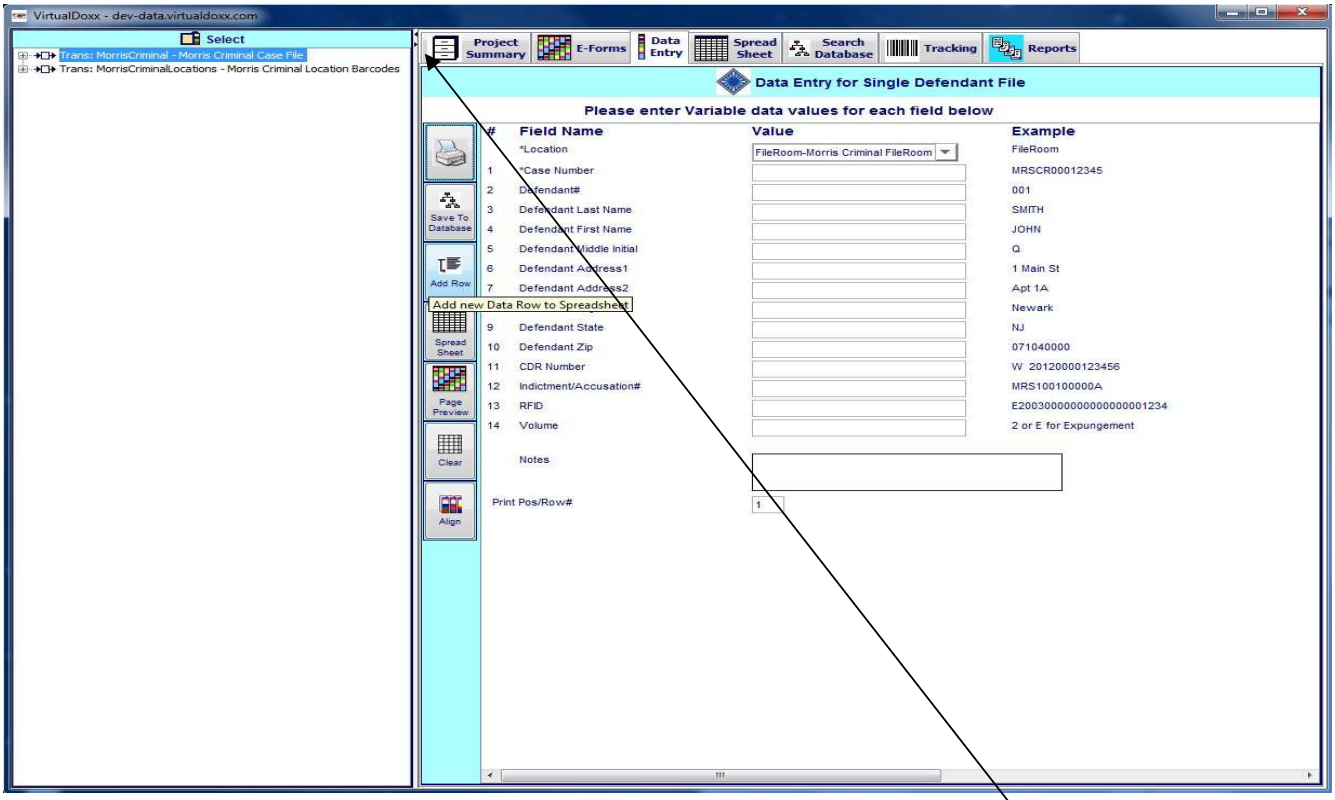
Data Views and Screen Manipulation

The Morris Criminal Virtual Doxx application includes two Data Views:

- **Case File**
- **Location Barcode Sheet**

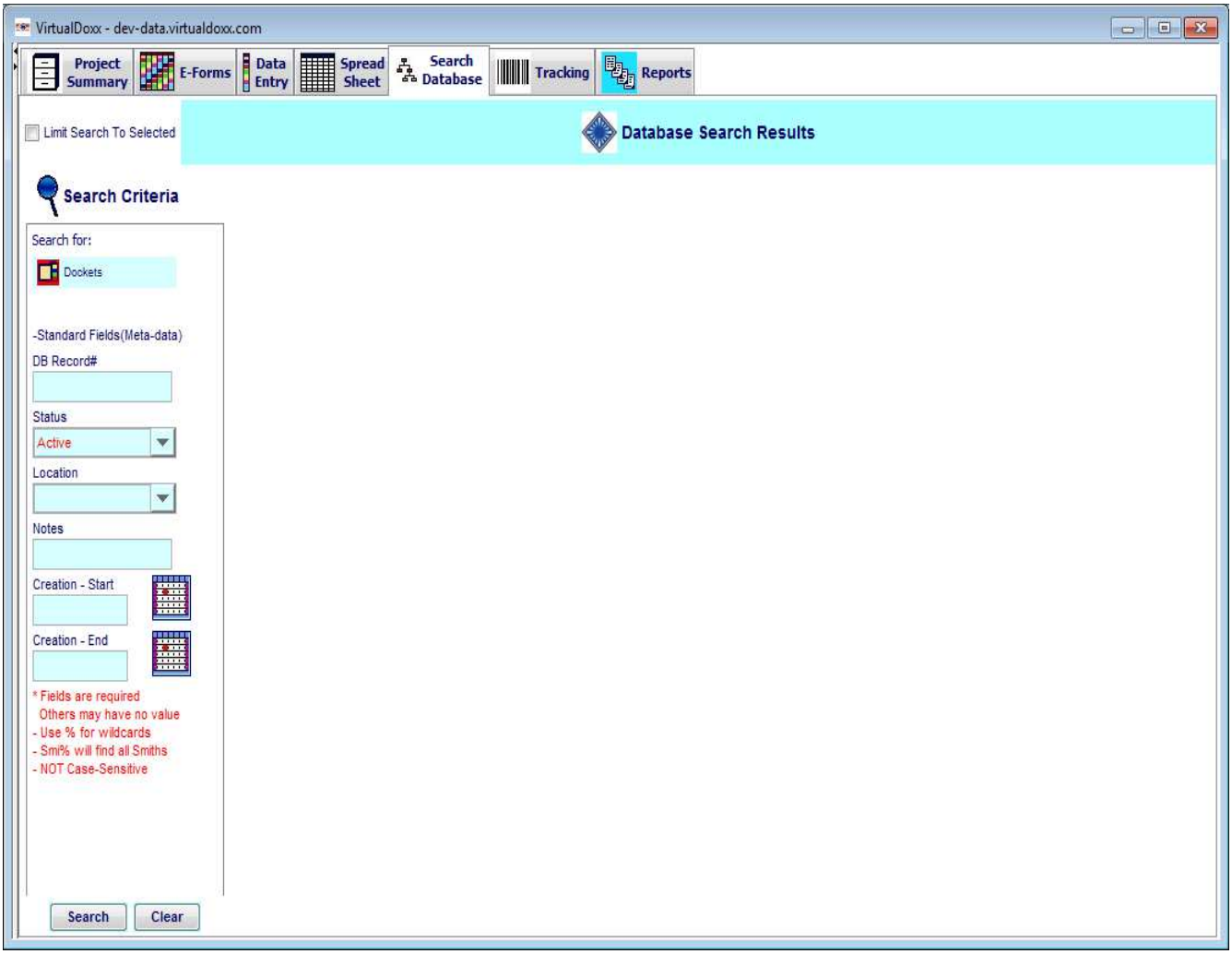
These are shown along the left panel of the window.


VirtualDoxx - dev-data.virtualdoxx.com
Select
Trans: MorrisCriminal - Morris Criminal Case File
Trans: MorrisCriminalLocations - Morris Criminal Location Barcodes



Almost always, the Records Data View will be used. As such, Users may choose to 'drag' the right portion of the screen to overlay the left portion. Or, Users may click the left ◄ to 'hide' the left side of the screen. To 'unhide' the left side of the screen, the ► can be clicked.

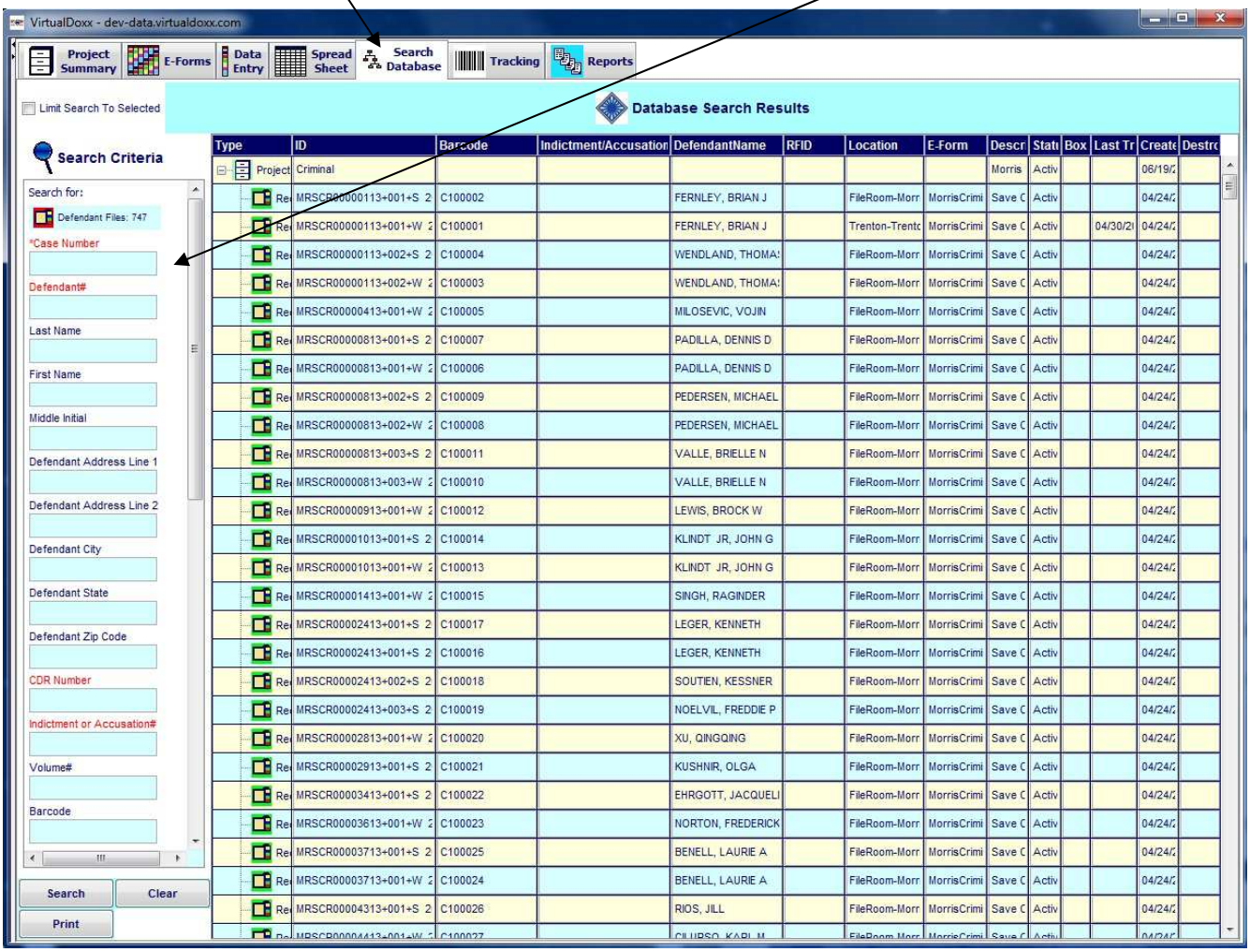
Assuming that the left side of the window has been 'hidden', the software will display as per below:


VirtualDoxx - dev-data.virtualdoxx.com
Project Summary
E-Forms
Data Entry
Spread Sheet
Search Database
Tracking
Reports
Limit Search To Selected
Database Search Results
Search Criteria
Search for:
Dockets
-Standard Fields(Meta-data)
DB Record#
Status
Active
Location
Notes
Creation - Start
Creation - End
* Fields are required
Others may have no value
- Use % for wildcards
- Smi% will find all Smiths
- NOT Case-Sensitive
Search
Clear

Printing Labels, and Commissioning RFID numbers

There are two ways to print new labels in the VirtualDoxx application once an indictment has been filed and a record becomes active: the **single print method**, and the **queue print method**.

First, select the **Search Database** tab at the top of the screen. Use any of the fields on the left side of the screen to search for a record or multiple records.



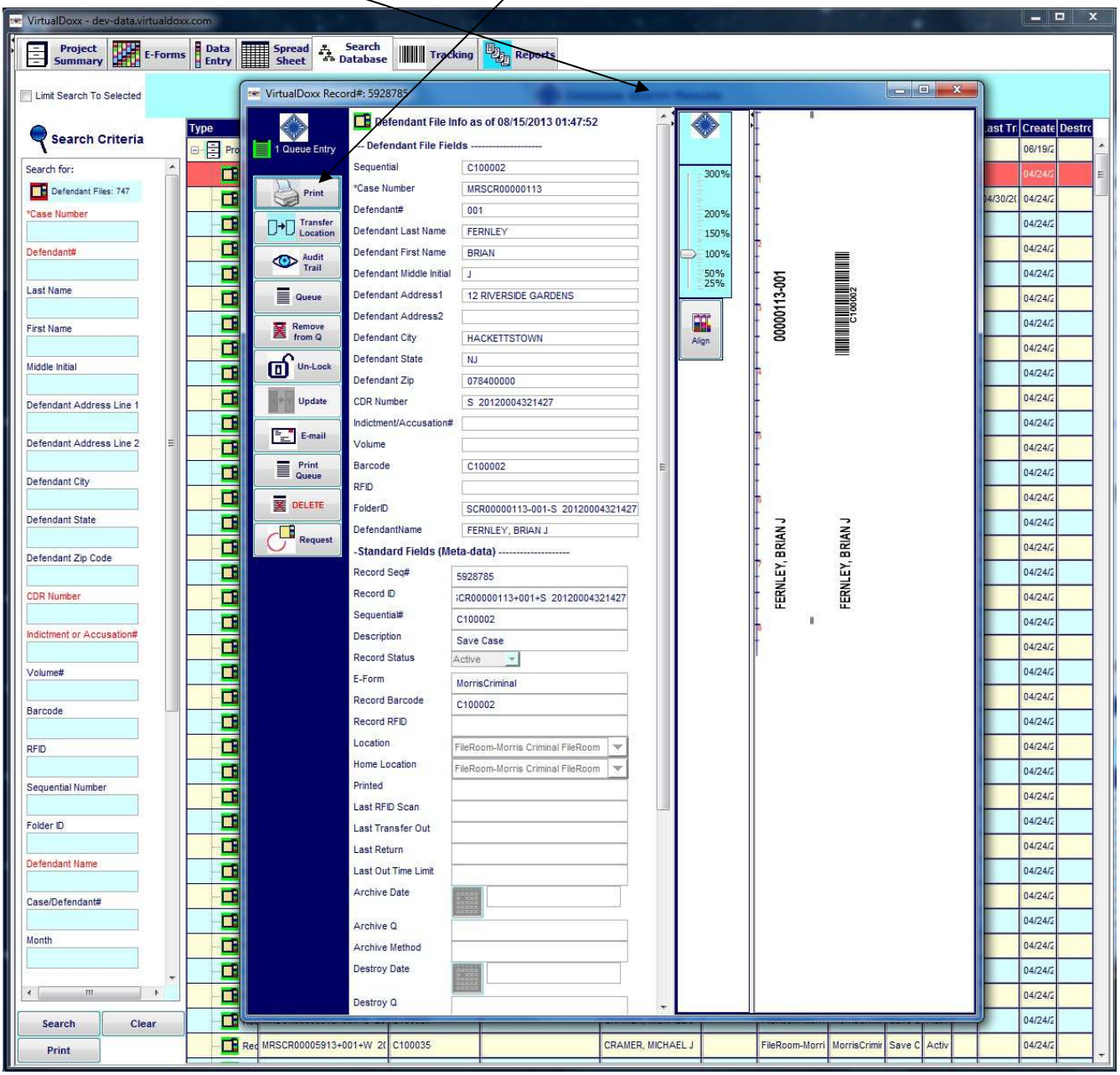
Please Note: You can perform universal searches or partial searches by using a "%". To perform a universal database search, simply type a "%" in any of the data fields and click search. To perform a partial search, type in part of a value into a search field and use the "%" either at the beginning or end of the value.

Example: "%E" will return all records that end in "E". "MRS%" will return all case numbers that begin with MRS.

Single Print Method

If you only want to print one record at a time, you can double-click on any search result and the **record detail screen** will pop-up.

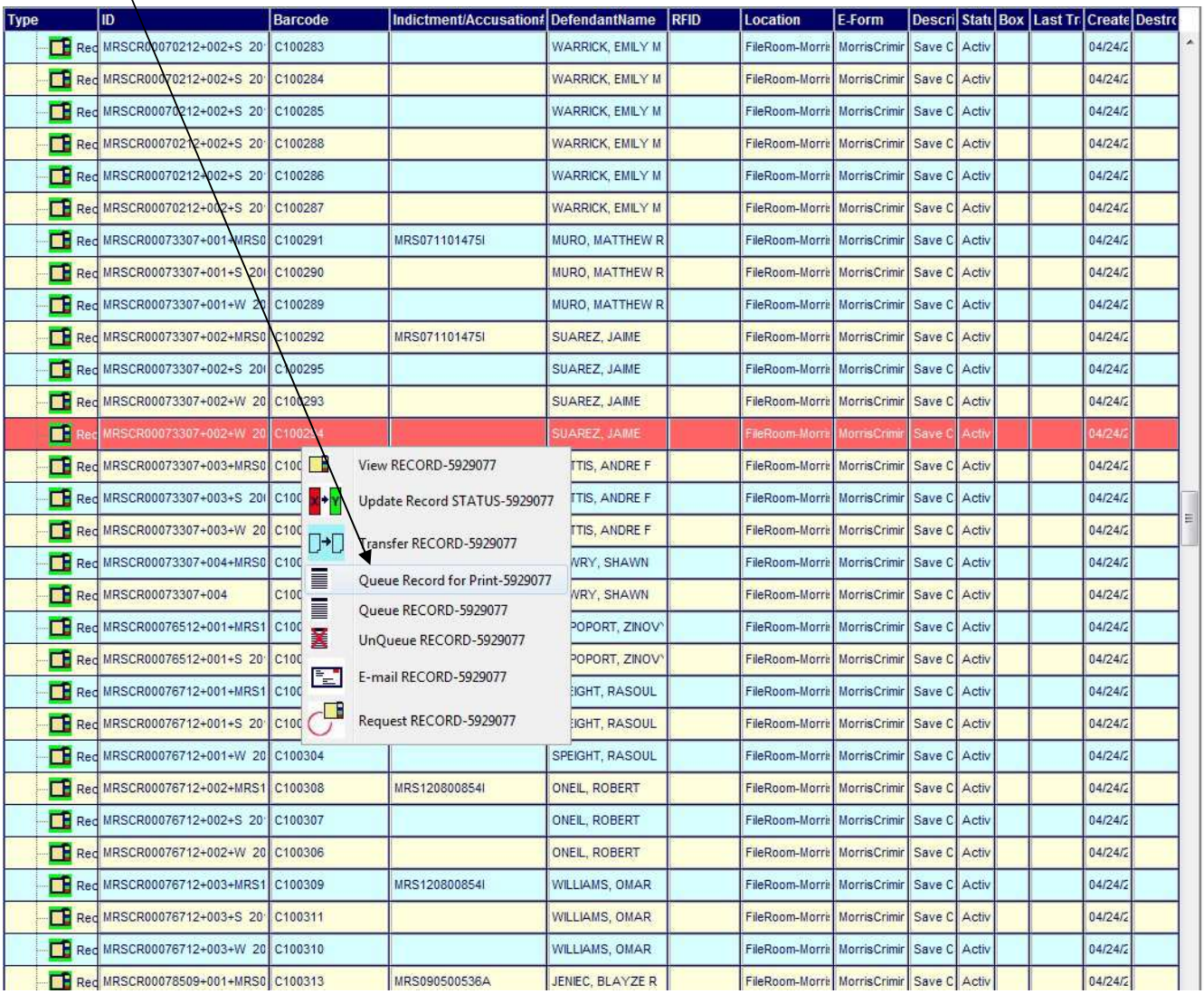
To print the label for that record, simply click **Print** on the left side of the record detail view.



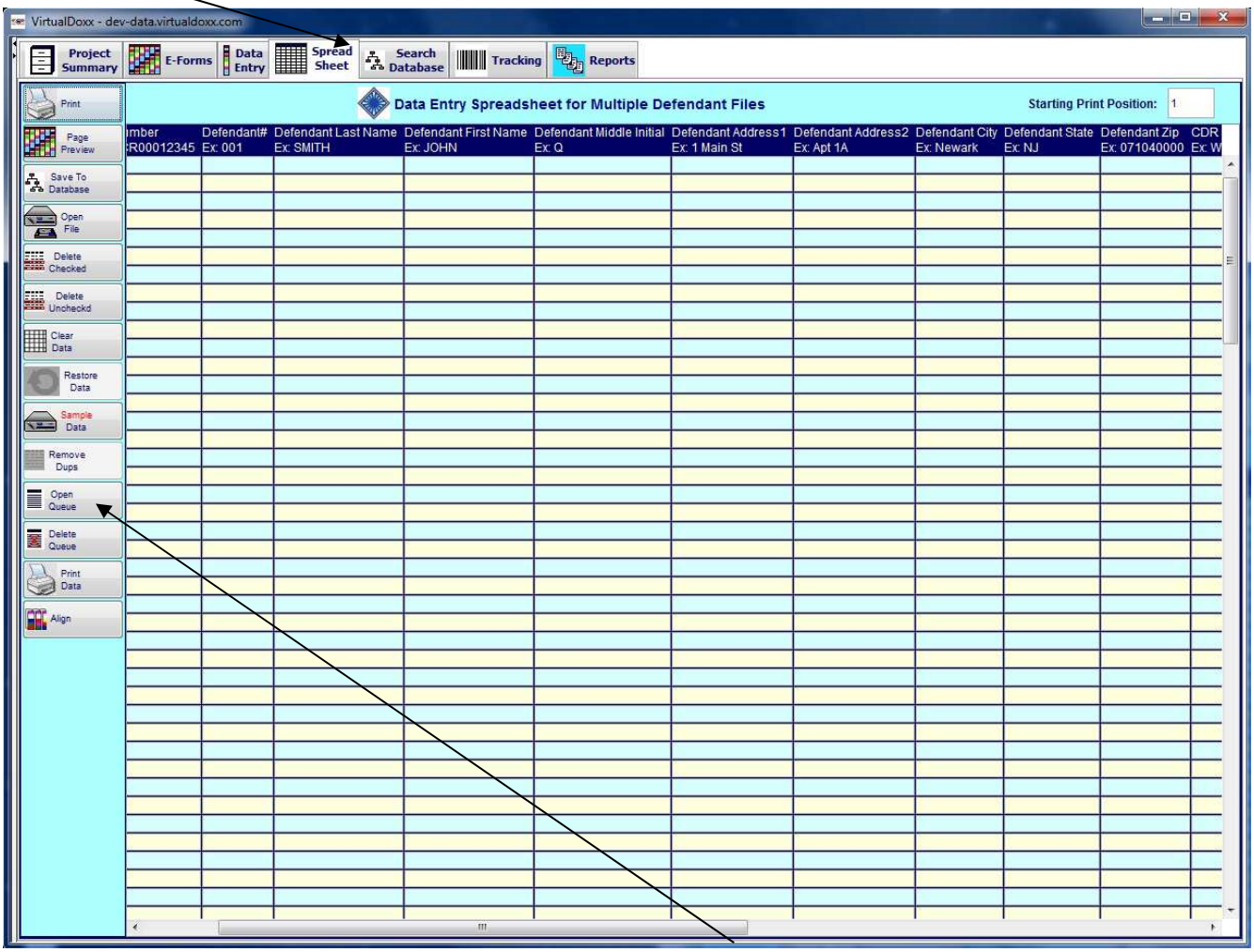
Multiple Print Method

If you want to print labels for multiple new records, locate each record using the search screen. Each time you find one of the records for which you want to print a label, right click on it, and select **Queue Record for Print.**

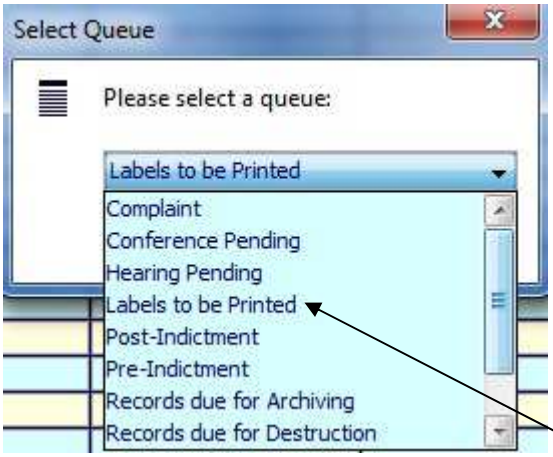
This will send each record you select to the **Labels to be Printed** queue – a list of records that you will be printing shortly.



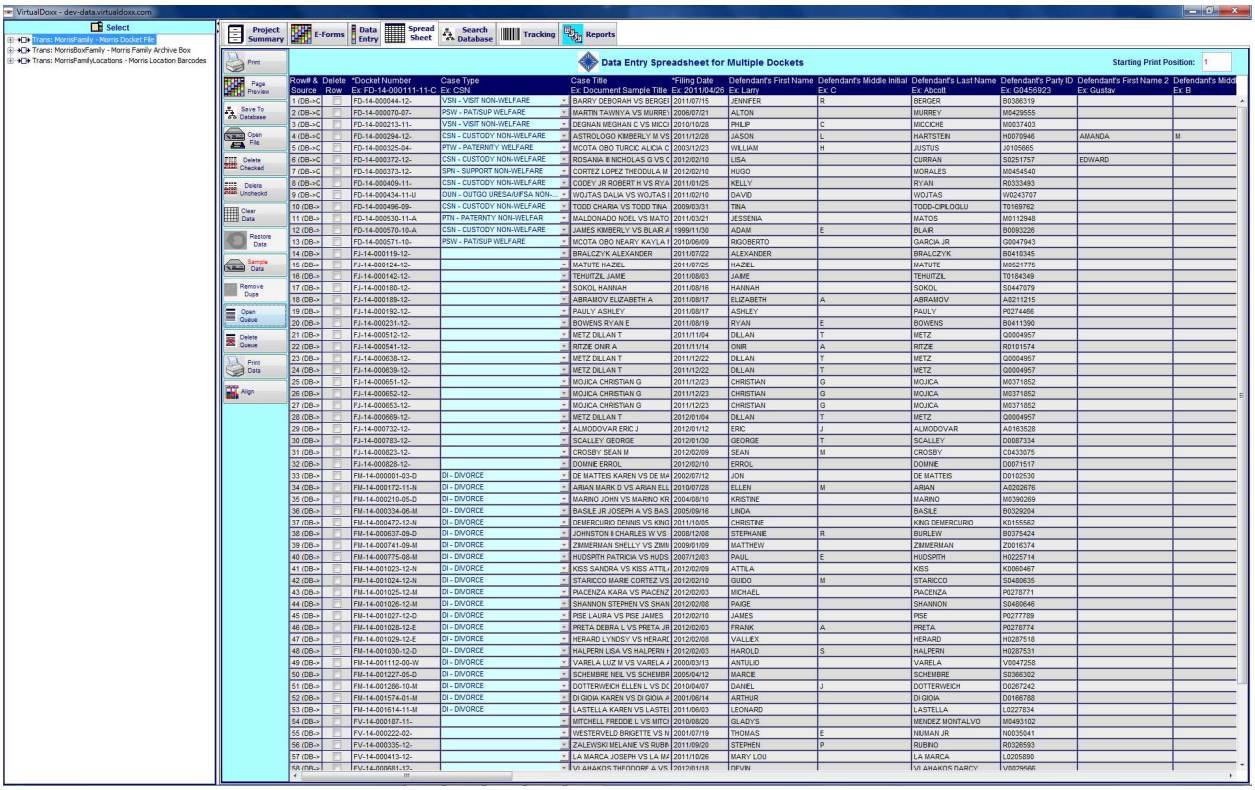
After you have queued all of the labels that you wish to print, they can be printed from the **Spreadsheet** tab at the top of the VirtualDoxx screen.



First, open the "Labels to be Printed Queue" by selecting **Open Queue** from the menu on the left side of the screen.



A pop-up prompt will allow you to open any one of your queues. Select **Labels to be Printed** and press OK.



The spreadsheet screen will populate with the data for each of your new labels.

Clicking the **Print** button will print labels for each row of data.

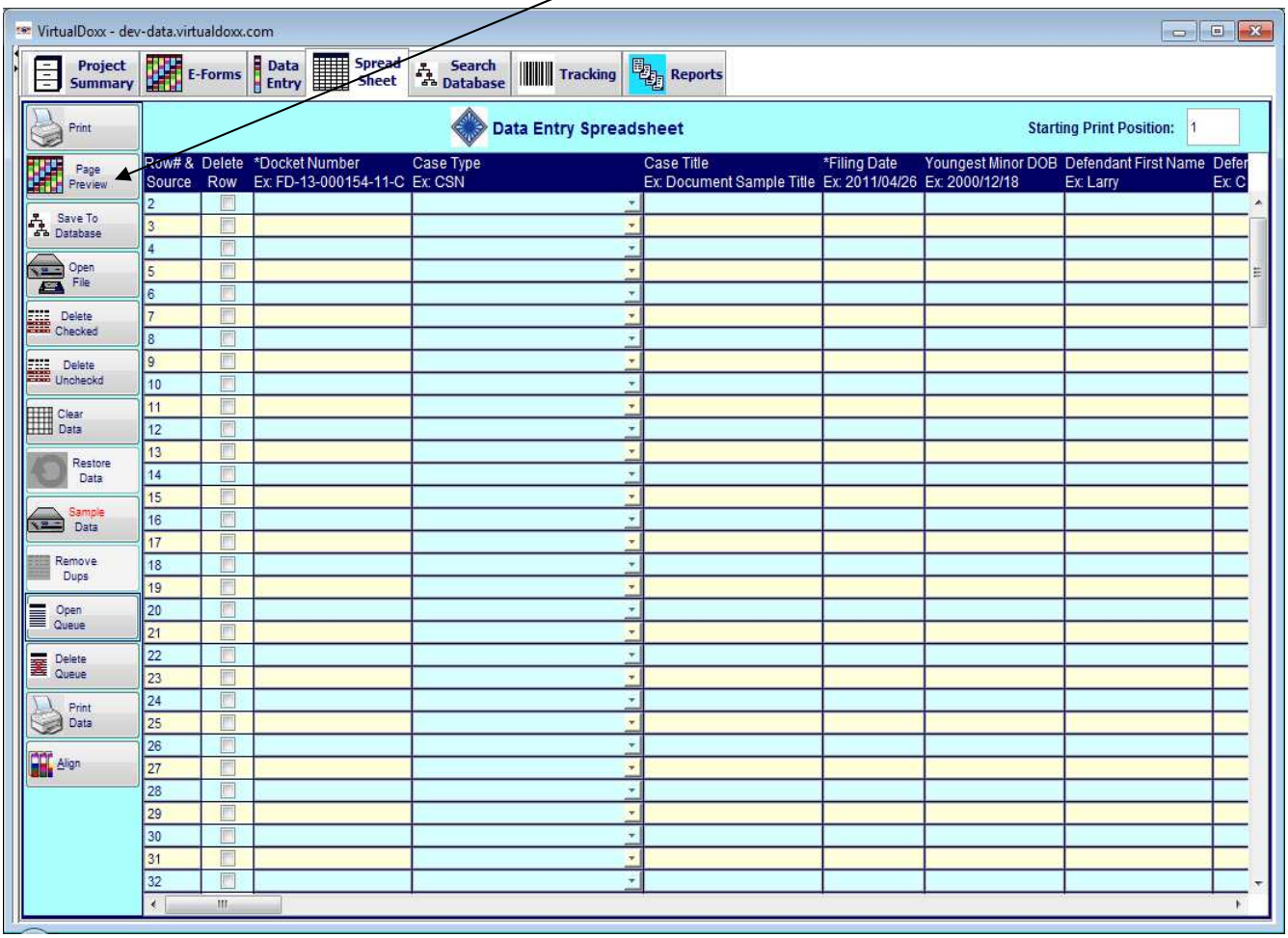
Clicking the **Page Preview** button will show a graphic of each label to be printed. See below.

Any rows can be checked, and then the Delete Checked or Delete Unchecked button can be clicked, to eliminate designated rows.

VIEW LABELS BEFORE PRINTING

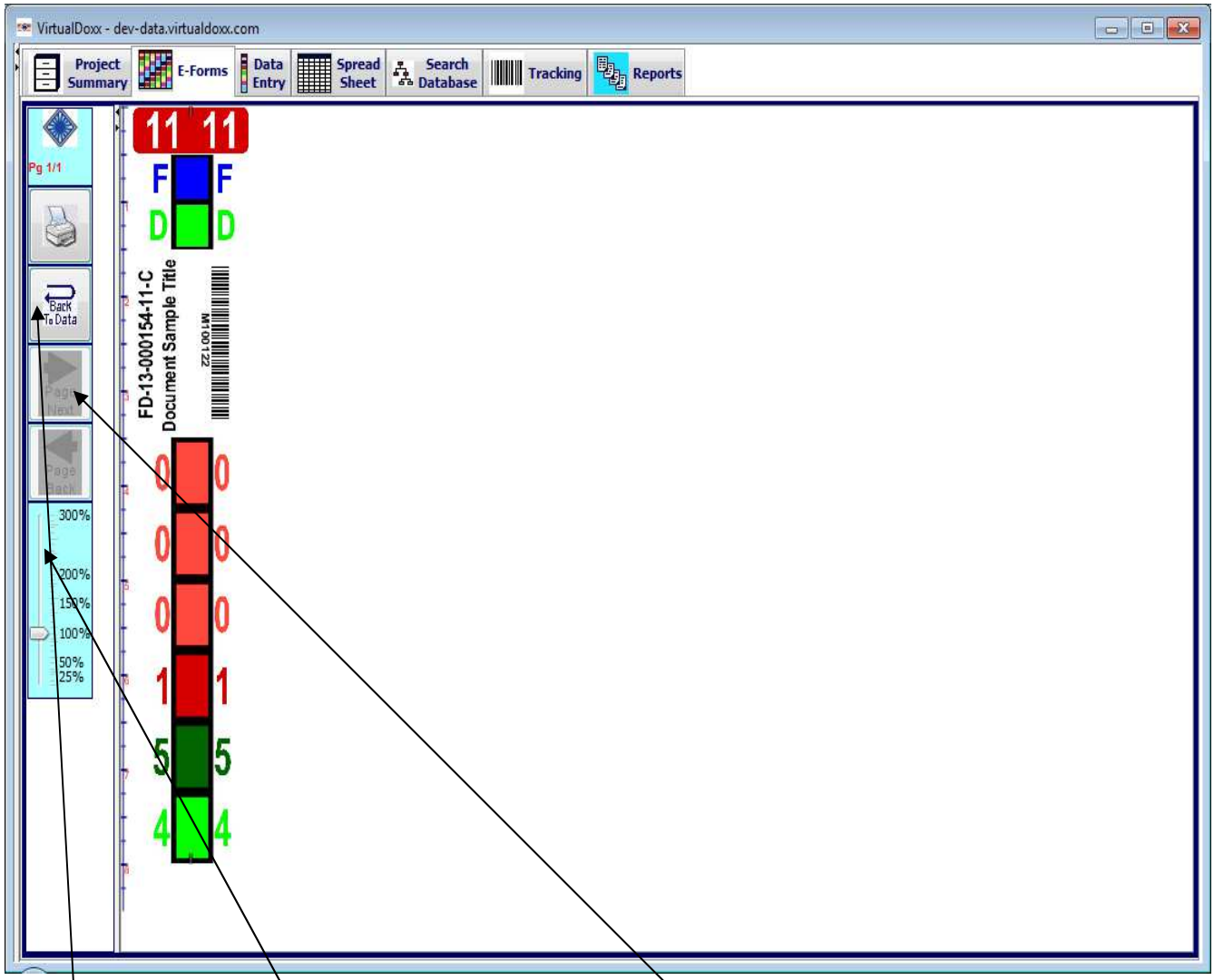
- as described above, when data entry is completed, clicking the PRINTER ICON will automatically save each record entered to the records management database, and, will print a label for each record entered. However, you can see what is about to print, as a final QC process, to ensure that the labels have the correct text fields/spelling/digits/characters, correct bar code and correct color-coding

- to see the labels prior to printing, click the **Page Preview** button



- the sheets of labels will display (or sheets of labels, depending on quantity). There are 4 labels per sheet, so any # of labels to print more than 4 will be shown on subsequent pages, so that all pages can be previewed, as described below in document narrative:

Upon clicking the Page Preview button, labels will display for each record entered

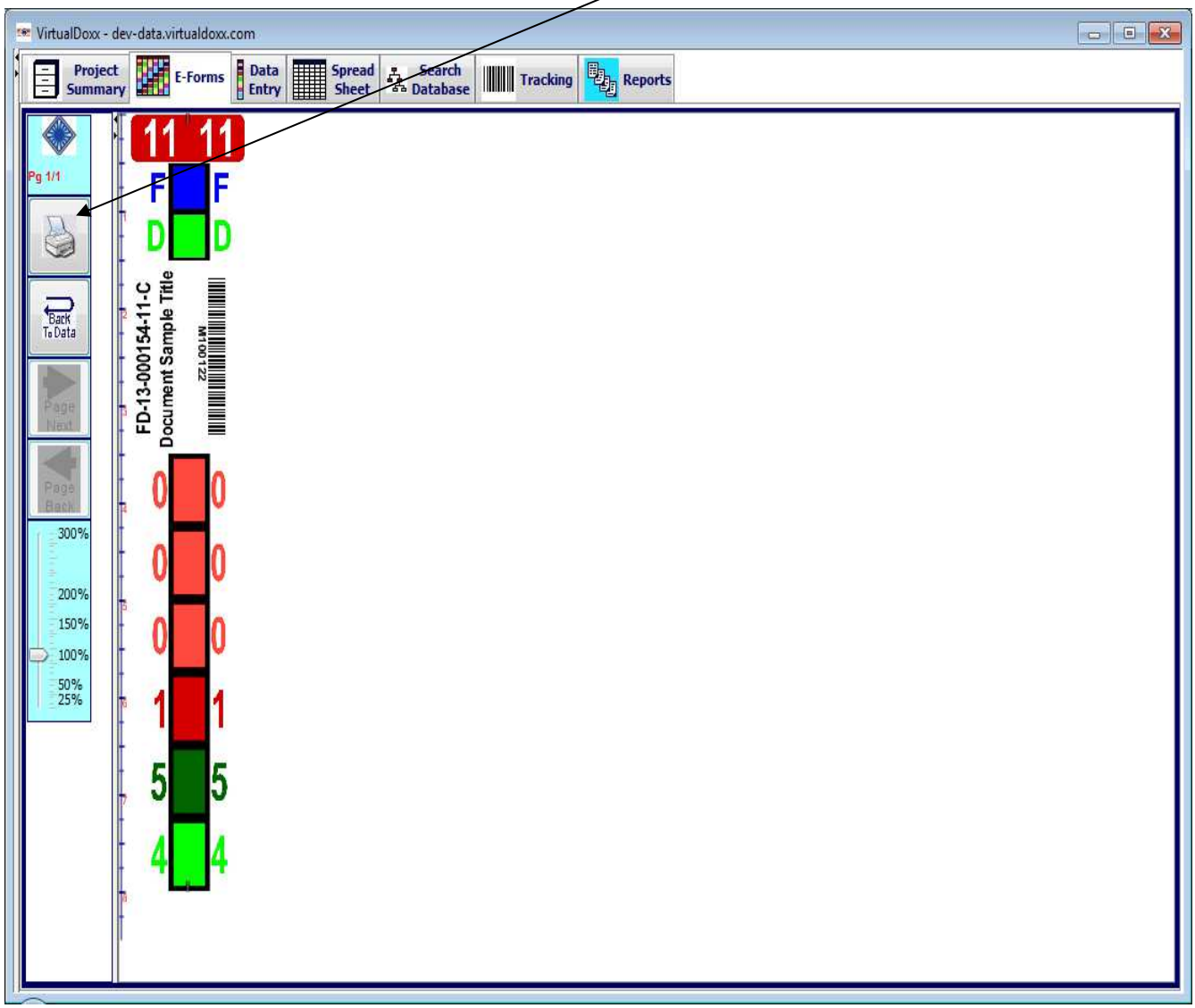


– if there are more than 4 labels to print, click the **'Page Next'** button to forward through pages to preview all labels

NOTE: there is a **'scroll bar'** that enables enlarging or descreasing the size of the label image(s), in case complete label(s) get 'cut off' at the bottom of the window and/or depending on what text needs to be reviewed and how large you want the font/text to display

– once the labels are previewed, if data needs to be corrected, or a label/record deleted, click the **'Back to Data'** button. This will take you back to the Spreadsheet. Individual fields/cells can be edited, rows can be checked and deleted, or, rows not checked can be deleted

– If no editing of data is required, simply click the **Printer icon** to print the labels:



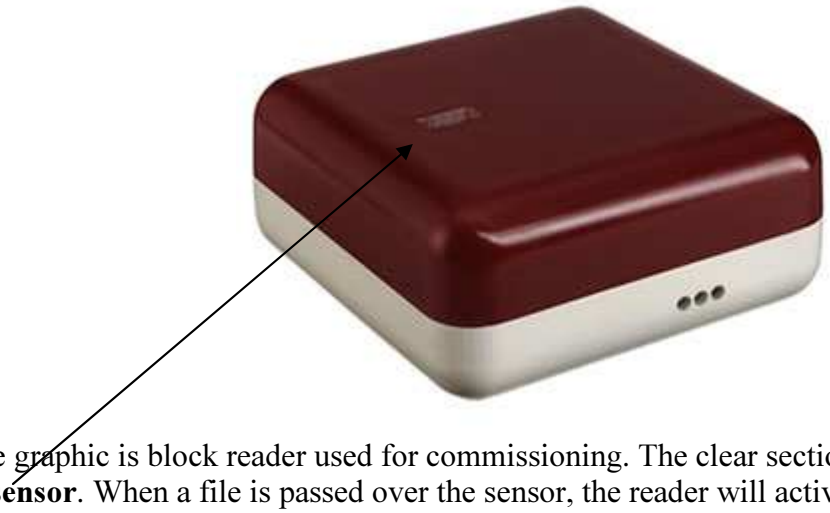
– **NOTE:** if the any record(s) that have been entered are already in the database, then the row(s) will be highlighted in YELLOW to alert the User that there is a problem. Using the Search screen. If the software did not check for duplicates, and prevent printing labels and creating more than one label / file folder for a data record, then the filing system would be fundamentally compromised, and STAFF could have a folder in their hand without all documents, because there is a second folder for the same case that they may not know about or have 'in hand'.

Applying Labels to Folders and Commissioning RFID #'s to the Database

If RFID #'s are not being commissioned to the database, ignore the below steps, and simply apply labels to folders. Take care to place the labels on the folders in the same vertical position on each folder, so that color bars align properly 'on the shelf'.

- Move label(s) **AWAY FROM THE RFID SCANNER**! After applying the label(s), you will commission the RFID # to the database, and **ALL OTHER LABELS or LABELED FOLDERS MUST NOT BE IN PROXIMITY**!!!! Otherwise, the wrong RFID # could be added to the database in error!!! This is just a cautionary note: the Scanner is designed to read the closest RFID tag, however, care should still be taken to ensure that other RFID labels or labeled folders are not in proximity when scanning/commissioning.

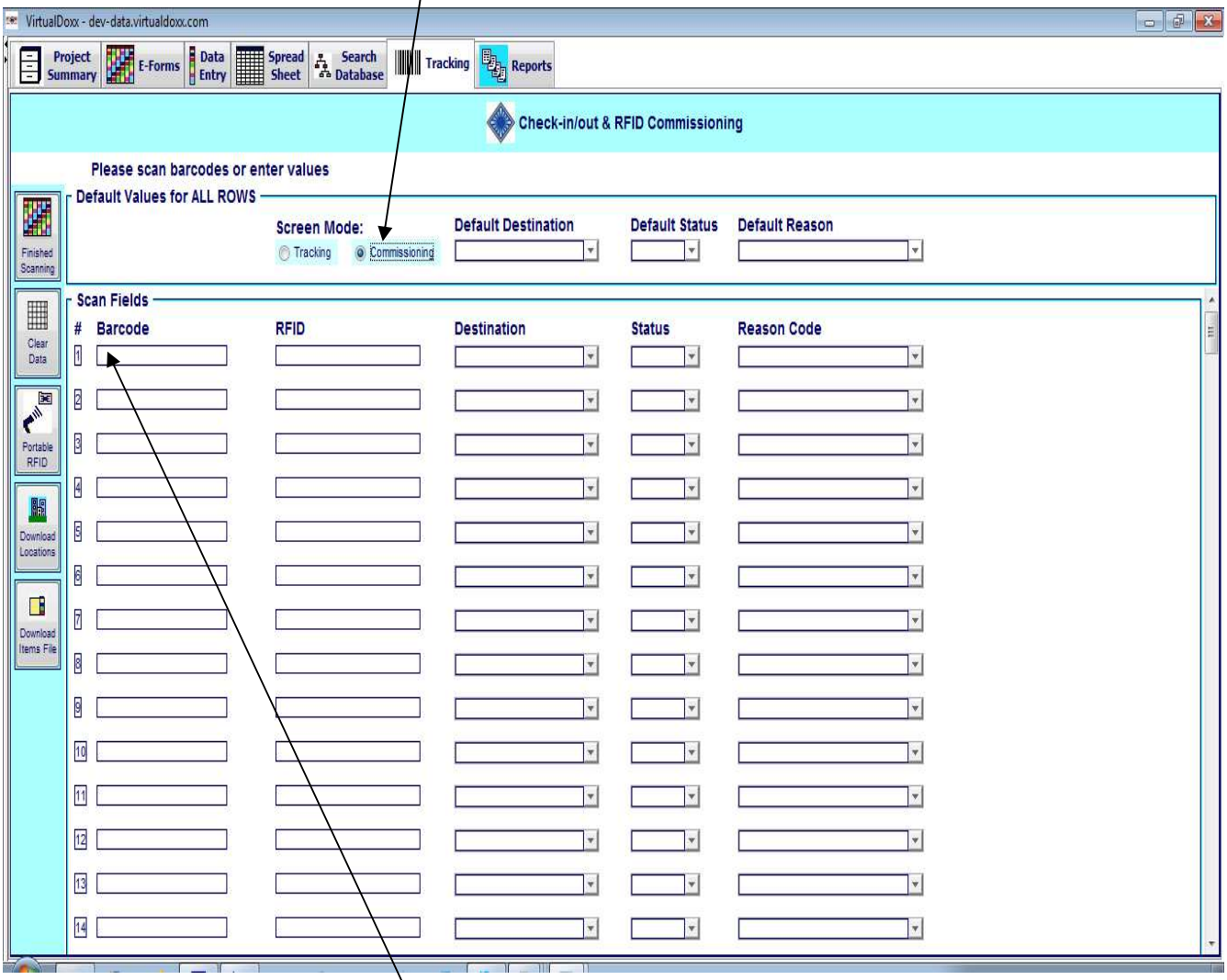
- Remove the label from the label sheet. Place the left side of the label over the front of the folder tab so that the black tick marks at the center of the label are aligned with the edge of the folder. Press firmly on the label to stick the first half of the label to the folder.
- Fold the right half of the label over to the back side of the folder. Press firmly to stick the right side of the label on to the folder.
- Your folder is now properly labeled and ready for commissioning



The above graphic is block reader used for commissioning. The clear section on the top of the reader is the **light sensor**. When a file is passed over the sensor, the reader will activate and read the RFID tag of the file that is being passed over the sensor.

Please Note: Keep the label sheet away from the Reader (see graphic below). This reader sends out radio waves, so when you use it, do not point it towards the file cabinets, and make sure that no other labels/folders are in proximity! Also note that walls etc. can reflect the radio waves, so best use is pointing away from file cabinets and desk and towards the floor

Once the folder has been labeled and BEFORE commissioning the RFID # to the database, go to the **Tracking Screen**. Click the '**Commission**' "circle"



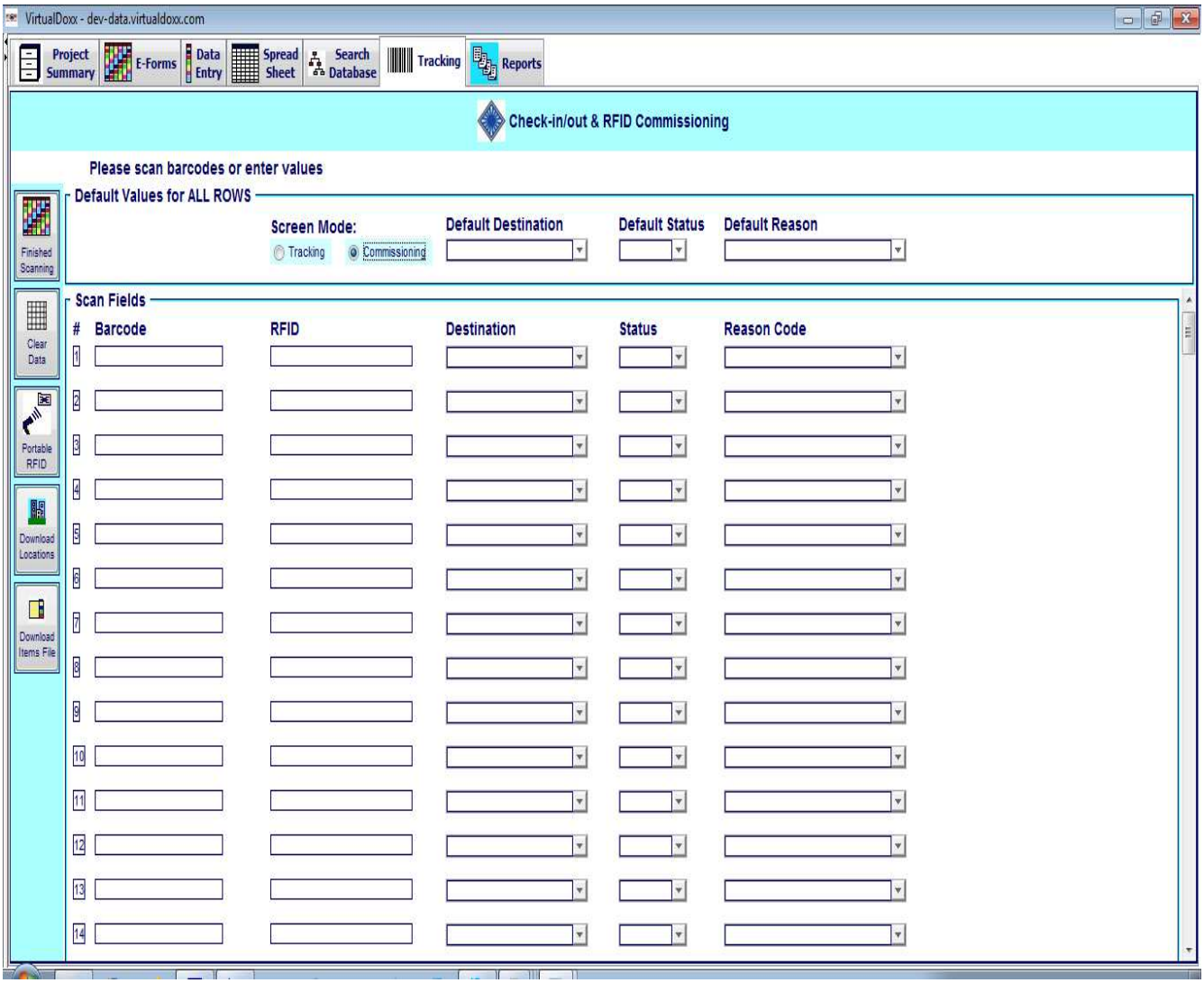
- place cursor in first **Barcode cell**

- Use your USB Barcode Scanner to scan the barcode of the record that you want to commission first. This will transmit the bar code # to the cell, and, will advance the cursor to the 'RFID' cell to the immediate right of the bar code cell / #

- now pass the file over the RFID block reader, making sure to pass over the light sensor, and the RFID # will display in RFID cell, and the cursor will advance to the next, below bar code cell

- once RFID # displays, MOVE THE FOLDER away from the scanner!

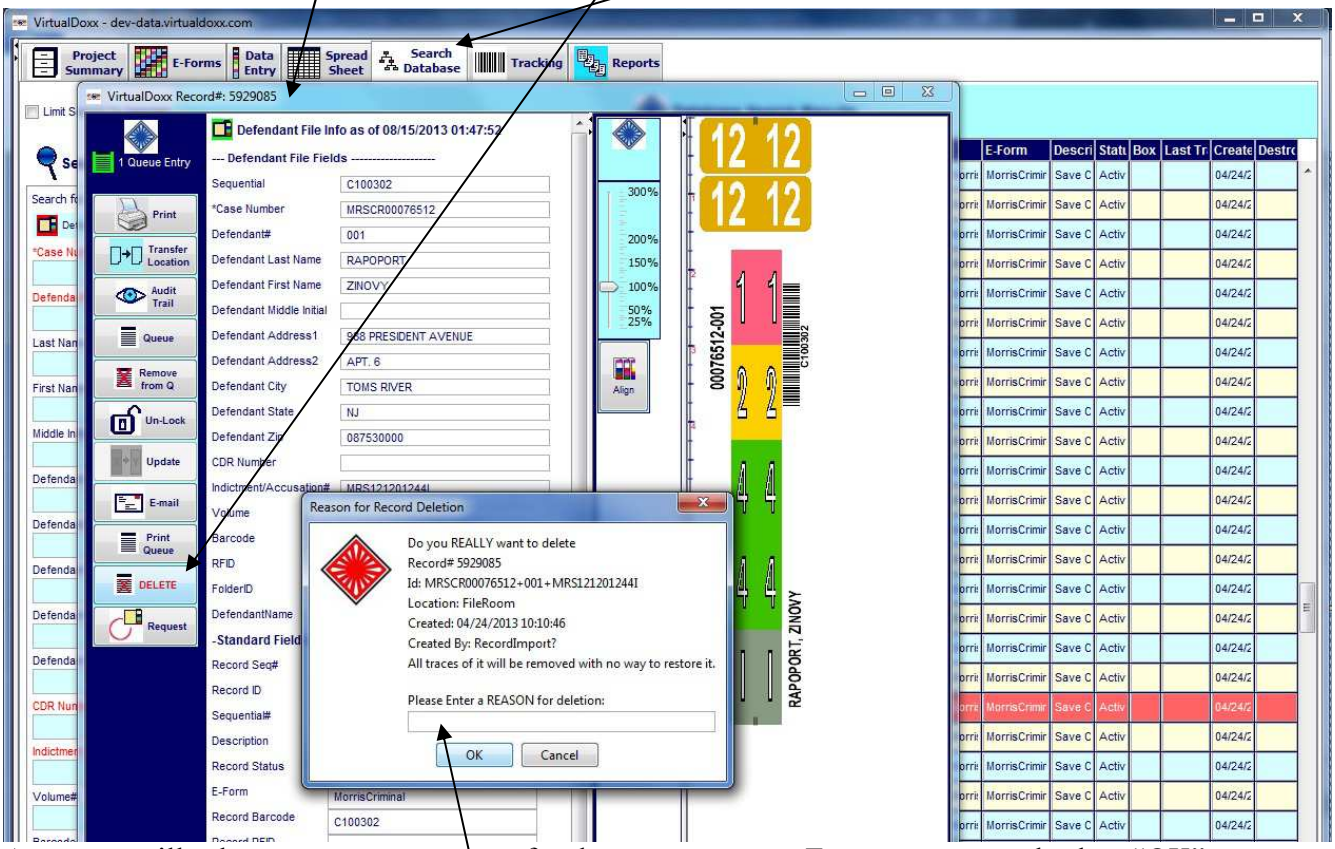
- if you are only doing one folder, then click the **'Finished Scanning'** button, and the data will save to database. This allows you to track and find the folder with RFID! If you have additional folders to label and commission, then repeat the above process for each folder, and then click '**Finished Scanning**'.



– **NOTE**: The Reports system includes a report for 'Records without RFID #'s' and a report for 'Records with Duplicate RFID #'s'. As such, you can always run either or both reports to ensure that the data in the database is correct.

Expunging a Record

To expunge a record, search for the desired record using the **Search Database** tab. Double-click the record to view the **record detail.** Then select **DELETE.**



A prompt will ask you to enter a **reason** for the expungement. Enter a reason and select "OK".

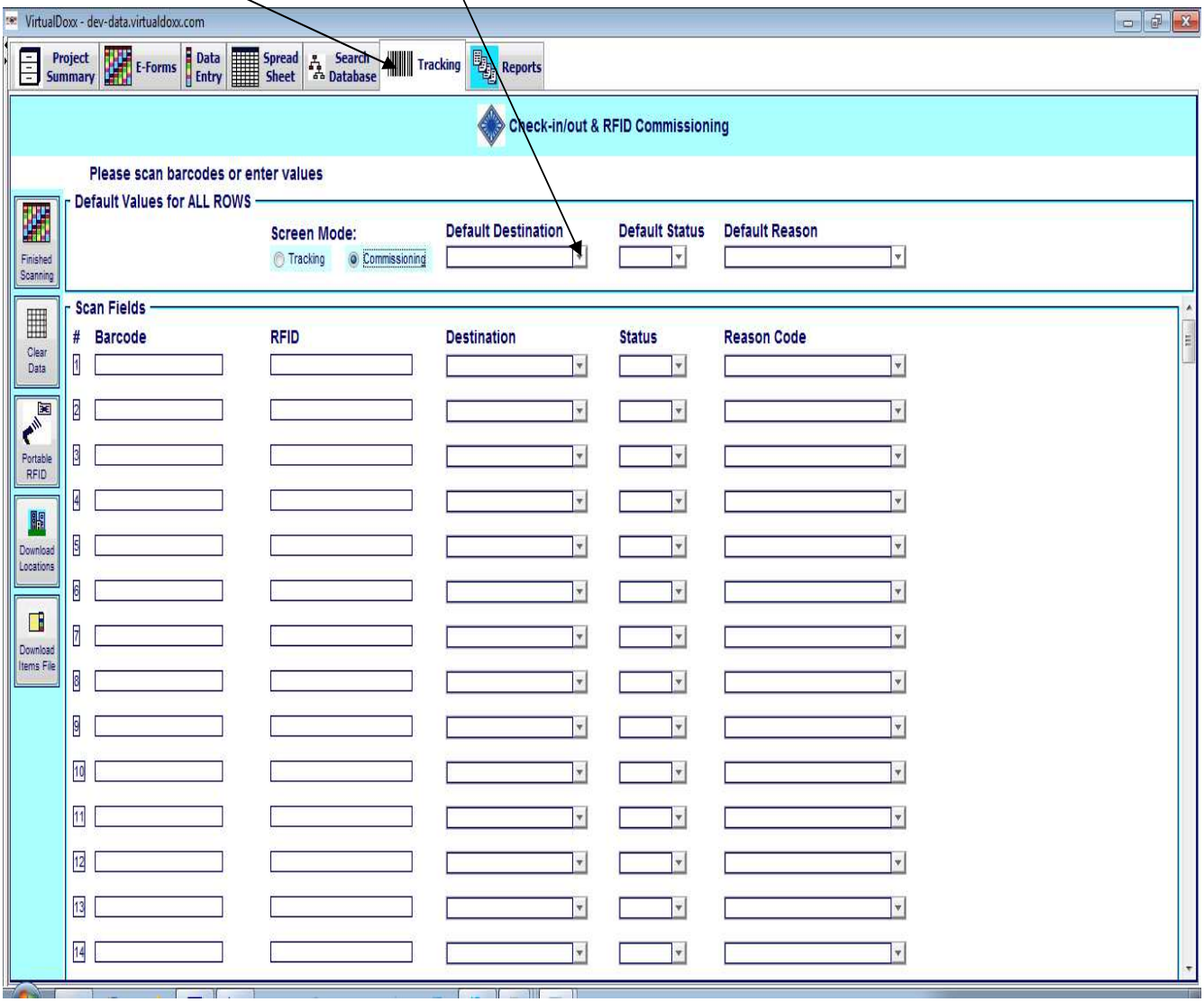
Expunged records will have all identifying information deleted. The remaining record will only note that a non-specific criminal record once existed, but absolutely no information about that previous record will exist anywhere in the database.

Tracking Records IN or OUT of Filing System

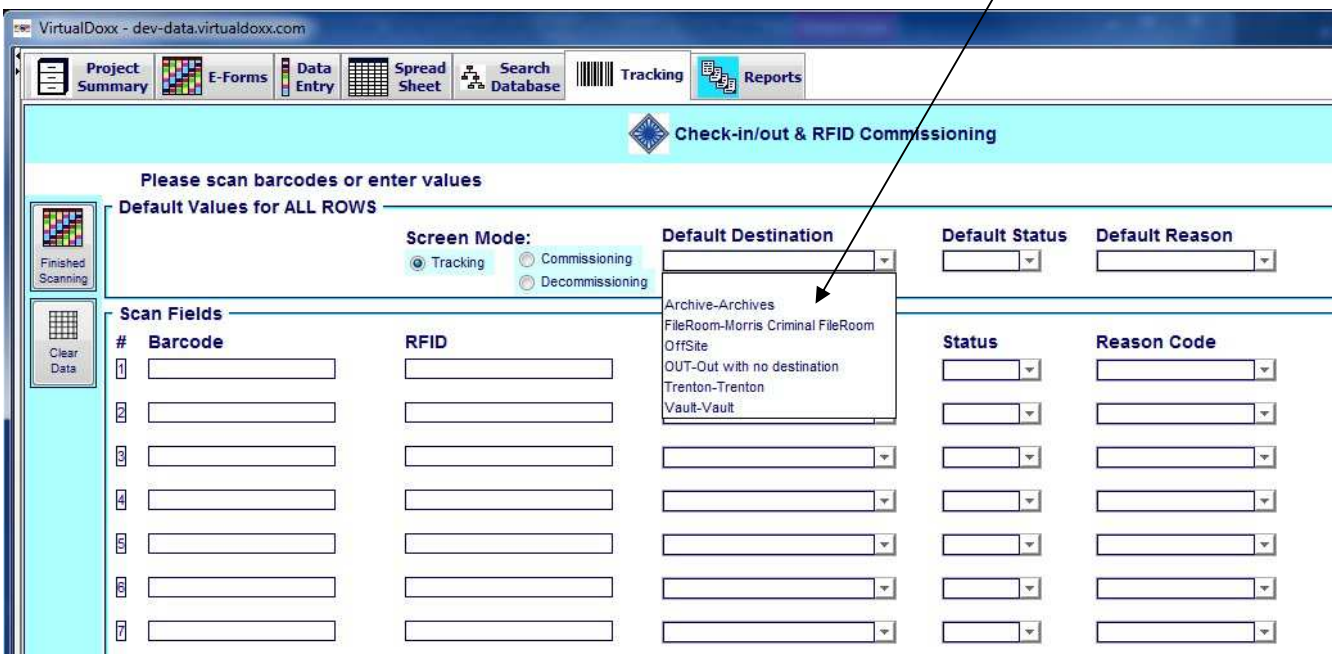
- go to the **Tracking Screen**

- if you are going to check multiple records to the filing system or to a specific destination, select the destination from the **'Default Destination'** list. This is common when checking folders INTO the filing system. If checking records out to one destination, also use Default destination. If you are going to check OUT to multiple people/destinations do not use Default destination. When you select the drop down arrow for Destinations, they will display in alphabetic order

Tracking Screen **Default Destinations**



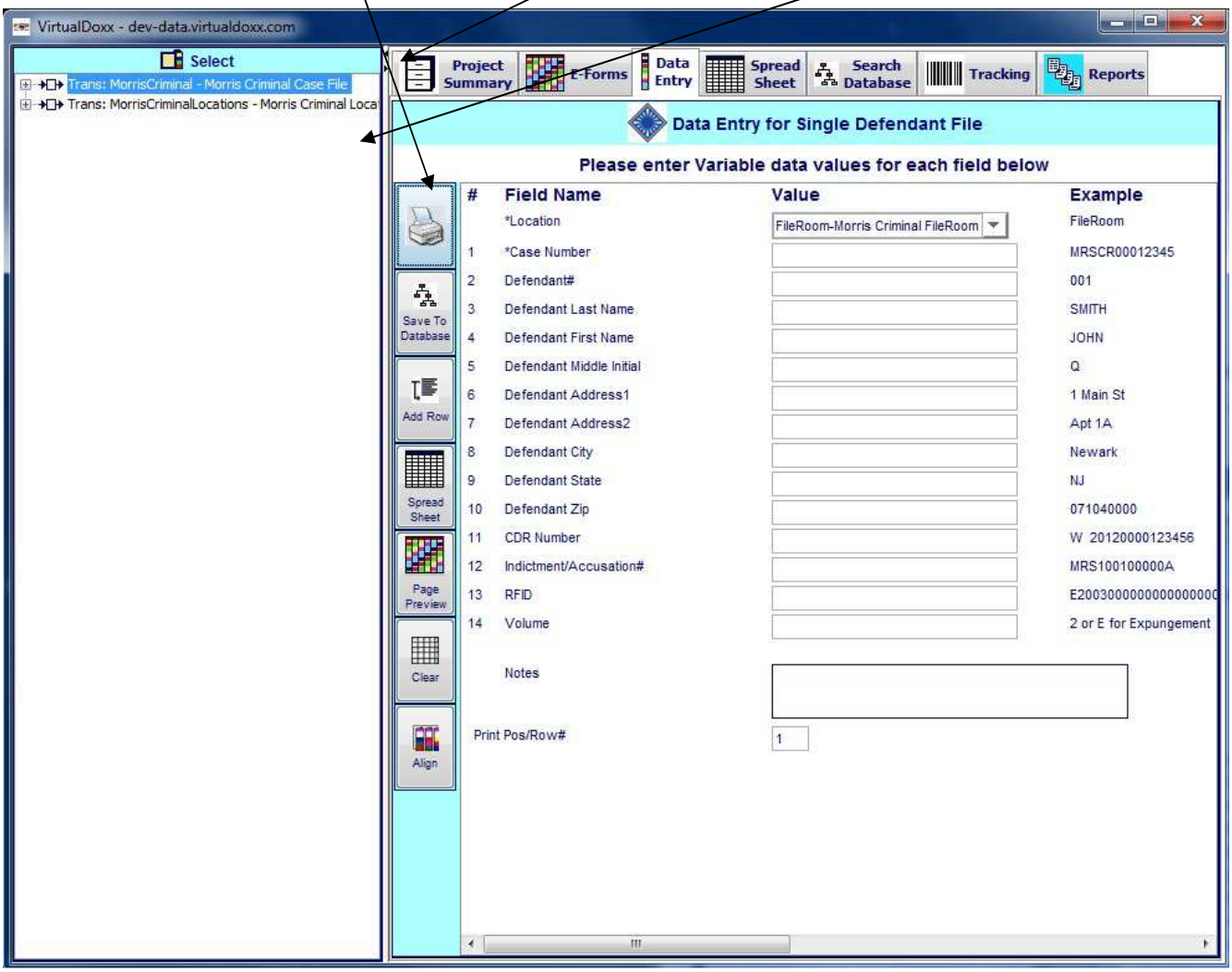
Shown below is the drop-down list that displays showing the destinations (people / places) to which files can be transferred (either IN to fileroom or OUT to a destination).



- if you are transferring multiple records to a single destination, use the Default Destination. Select this from drop down list or by scanning the Location destination list with bar code feature of scanner.

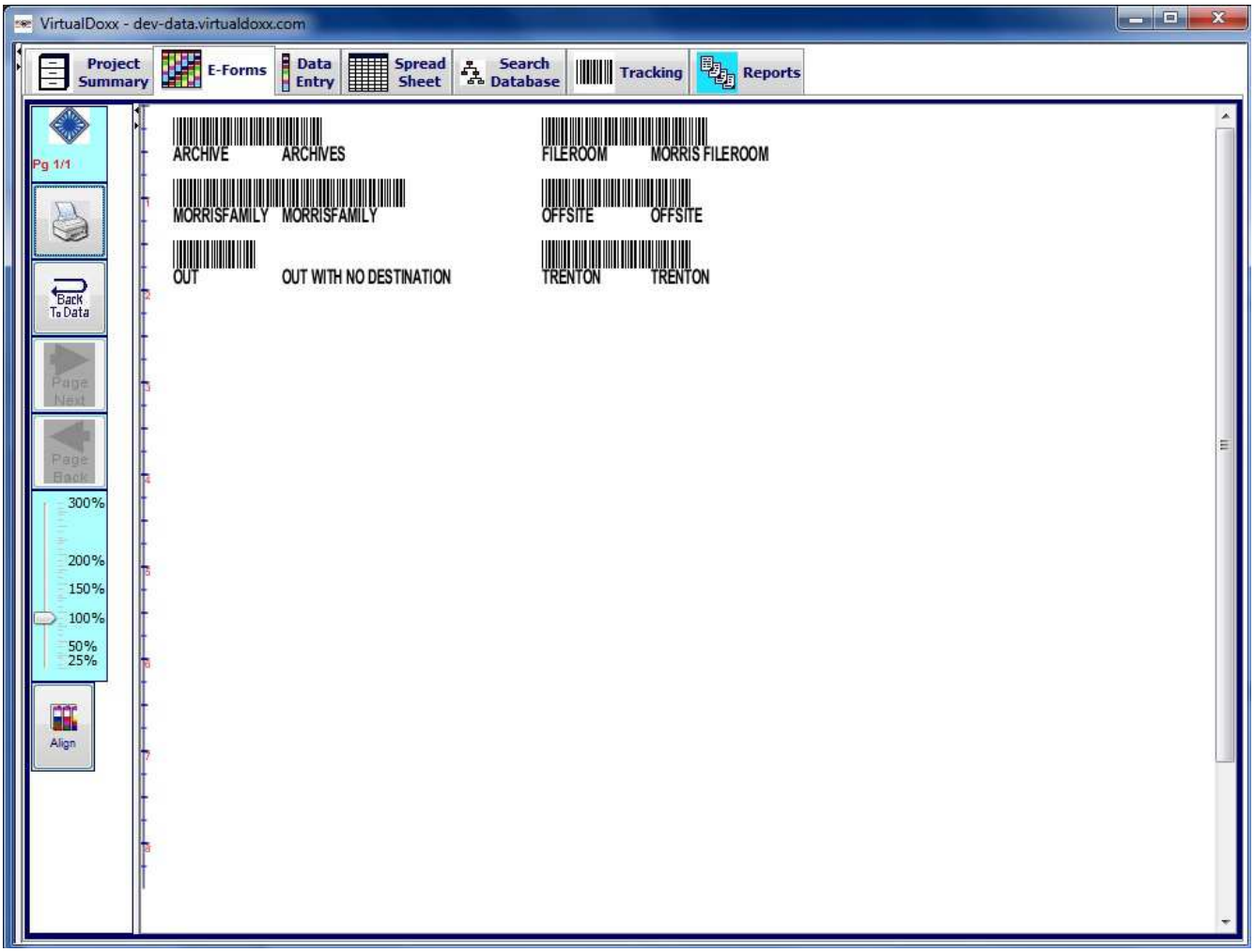
NOTE: You can printout the destination list as bar codes, and keep the sheets in proximity to computer/scanner. When transferring a batch of records, you can do one at a time with bar coding, which ensures accuracy, or, you can pull RFID trigger to scan a stack all at once. However, **the only way that you will know** if the records showing up on the screen **exactly match the folders being transferred**, is an eyeball-to-computer screen validation.

– to print out destination bar codes, open the **left window view** and click the '**Locations**' layout and then click the **Printer icon**

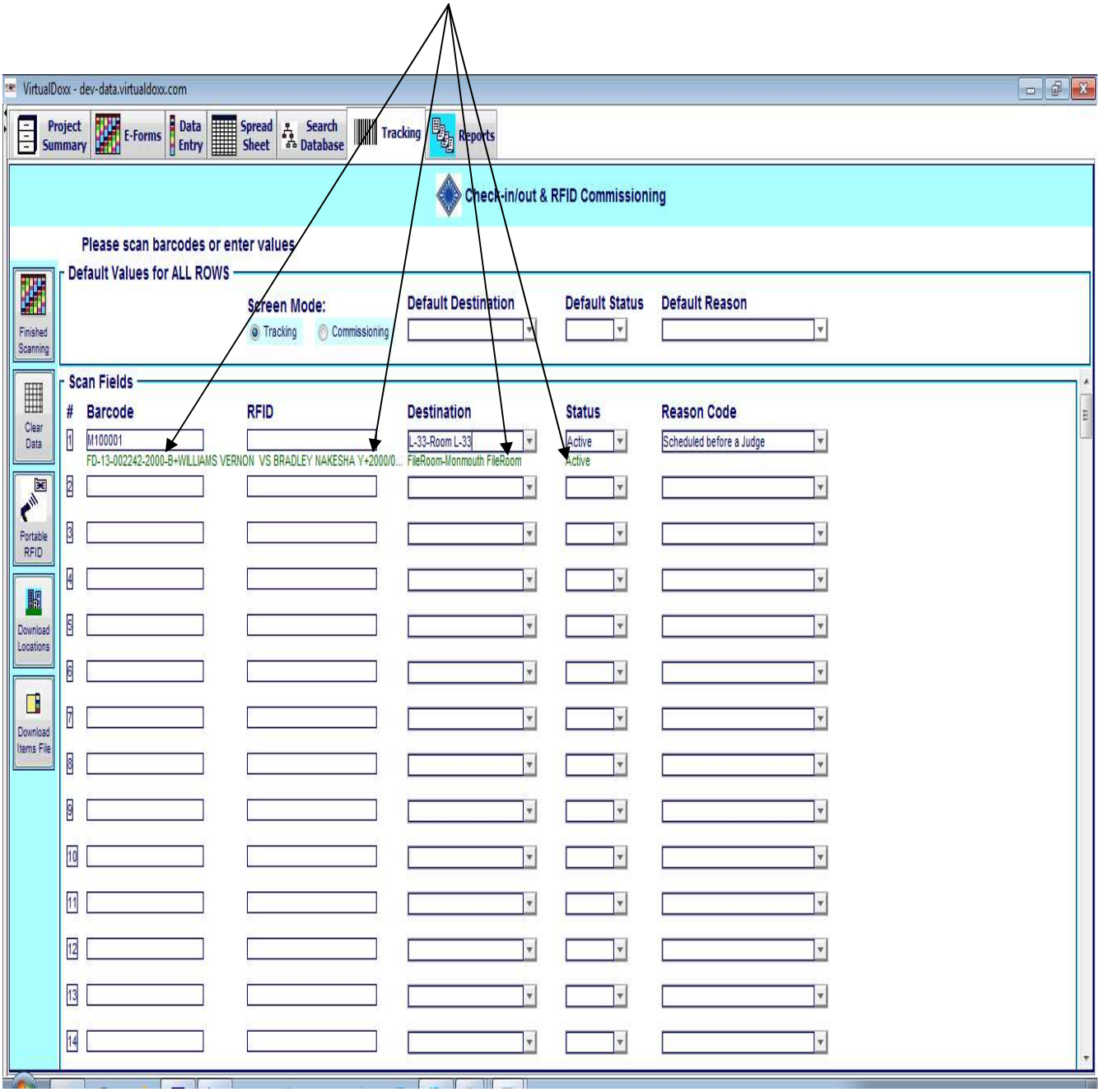


For each Location/Destination listed, as shown above, a bar code and a location description will print, once the Printer icon is clicked.

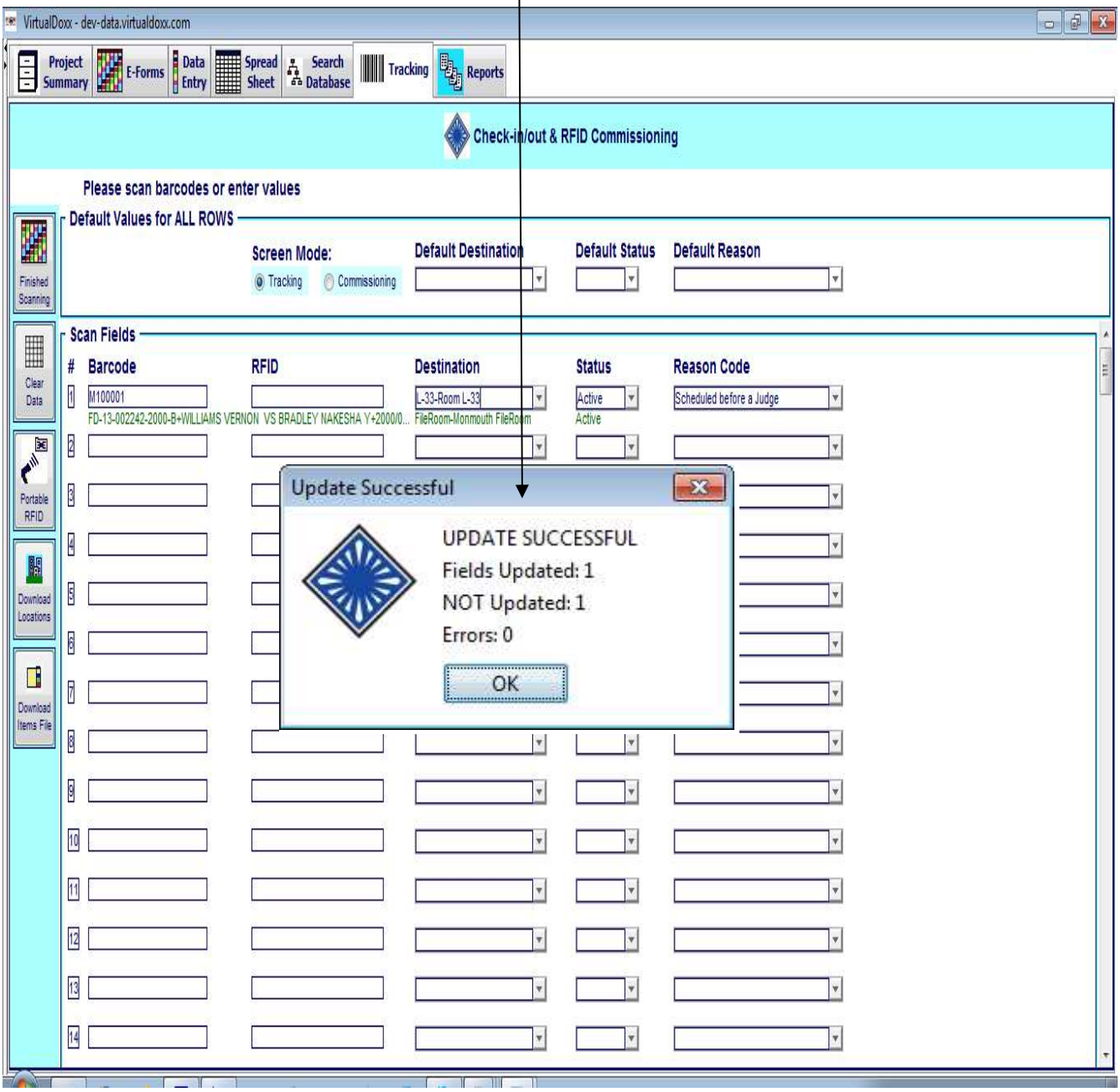
Note: You may print the Page Preview button to see the bar codes that will print, prior to printing, if desired, as shown below.



When record(s) are scanned, descriptive data about the record(s) scanned will display beneath the bar code / RFID cells in GREEN TEXT. The current Location will display under the Destination cell. The current Status will display under the Status cell.



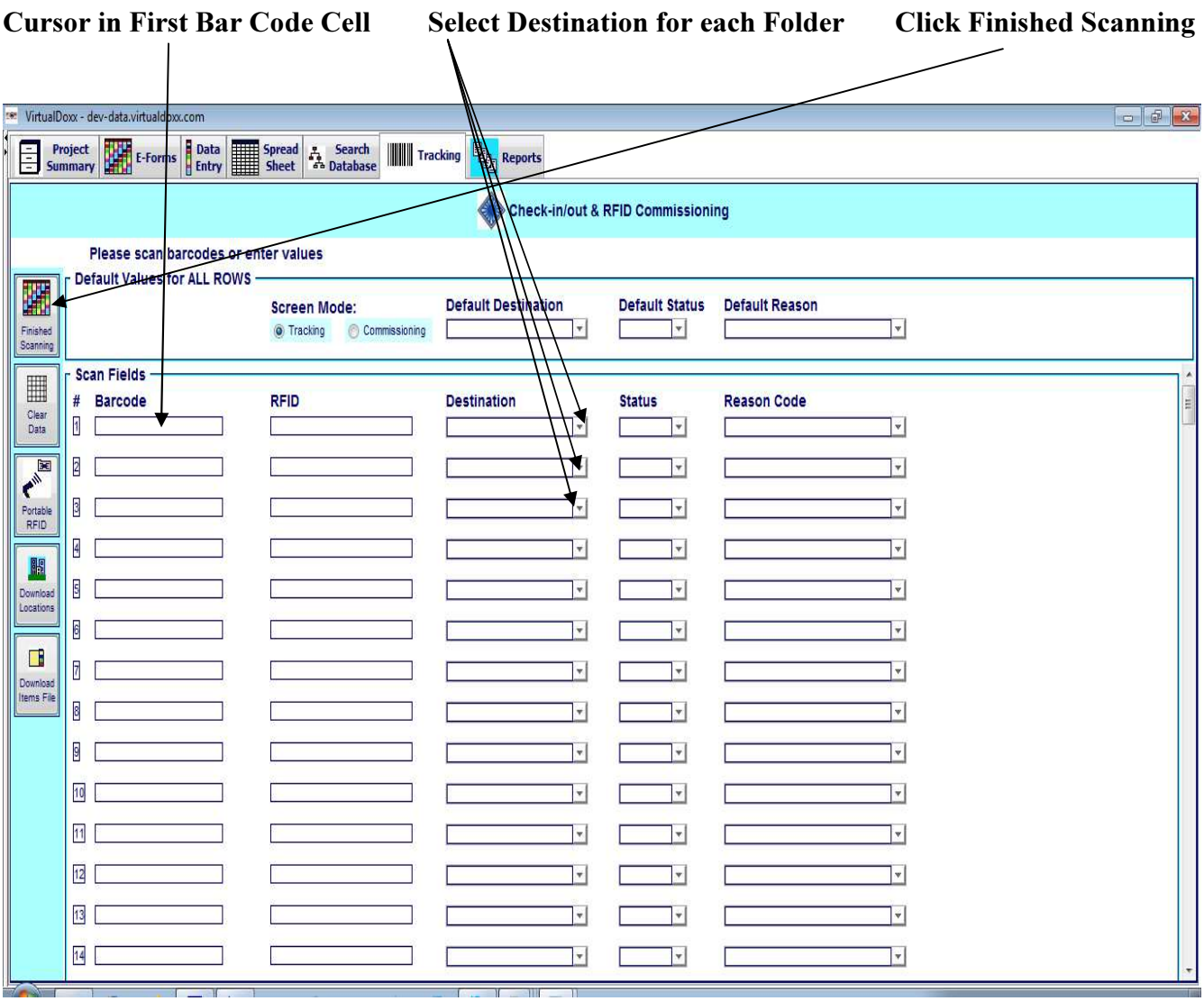
When all records being transferred have been scanned, click the **'Finished Scanning'** button, and the transaction will be completed. A message will display confirming the success of the transaction, along with a transaction summary.



Click **OK**.

- if you are going to transfer records to multiple destinations, then scan a bar code on the folder and then a bar code representing a destination, or, select destination from the drop down list, for each record being transferred. Once a record is scanned, the cursor will advance to the next/below bar code cell. Scan all records to be transferred, and select or scan a destination for each.

- once finished scanning, click the **Finished Scanning** button to complete the event



Note: When using the Tracking Screen for record transfers, make sure that the Tracking circle is selected, and not the Commissioning circle. The cursor advances differently for Tracking versus Commissioning. When Tracking, upon scanning, the cursor will advance to the next row/cell below for scanning the next record. When Commissioning, the cursor will advance from the bar code cell to the RFID cell.

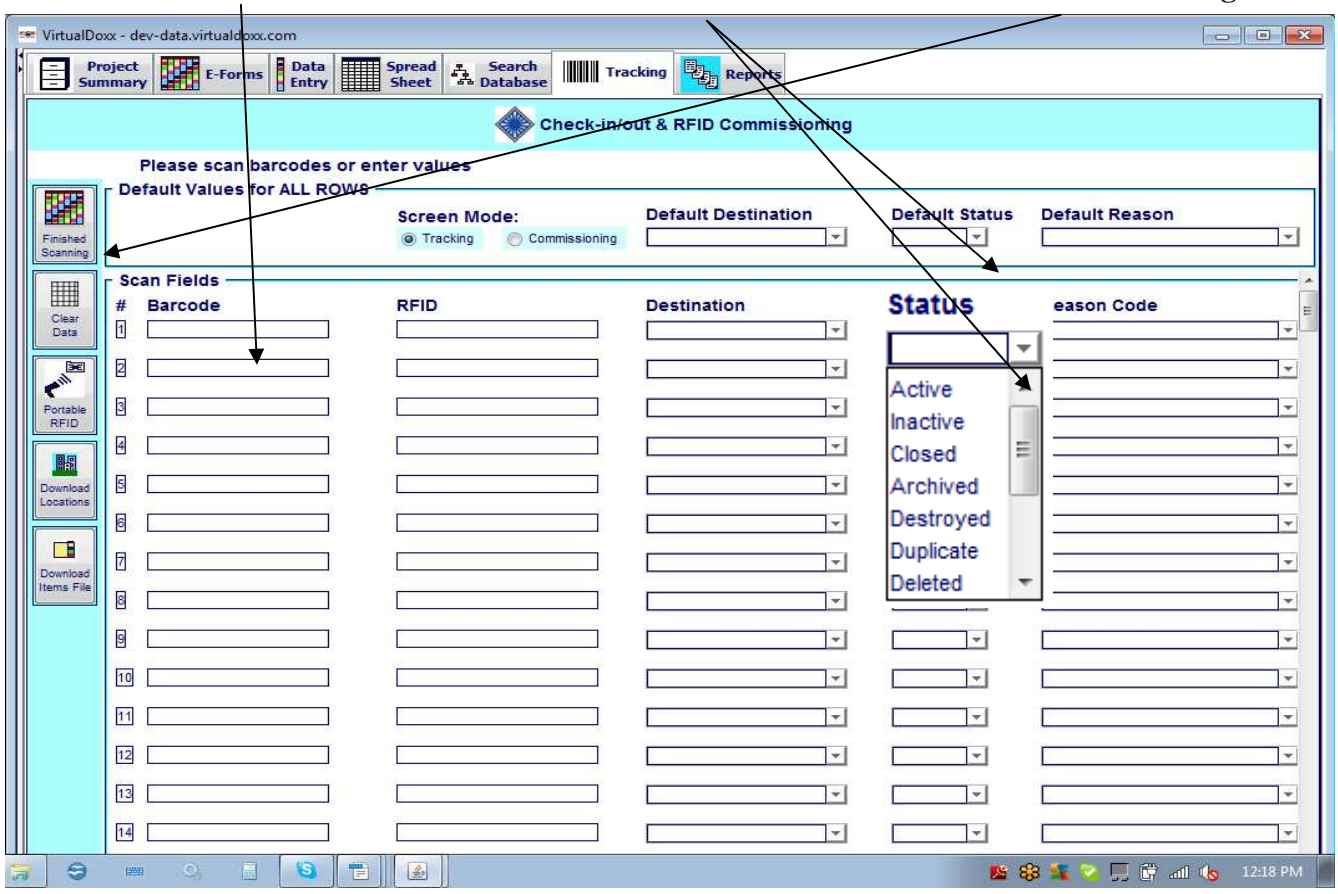
Changing Status of a Record

If the status of a record needs to be changed, scan the bar code on the folder, or, enter the bar code #, and select from the Status drop down list. Then click '**Finished Scanning**' to complete the transaction. Status values that can be applied to any record include (additional Statuses can be easily added, such as 'lost', 'open', 'closed', etc.:

Active
Inactive
Closed
Archived
Destroyed
Duplicate
Deleted
Sealed
Transferred
Expunged

Status change can be a default for all records being updated, or, can be different for each record, as described above (as to selecting default or discreet values or destinations).

Scan Bar Code or Enter Bar Code **Select Status Value** **Click Finished Scanning**



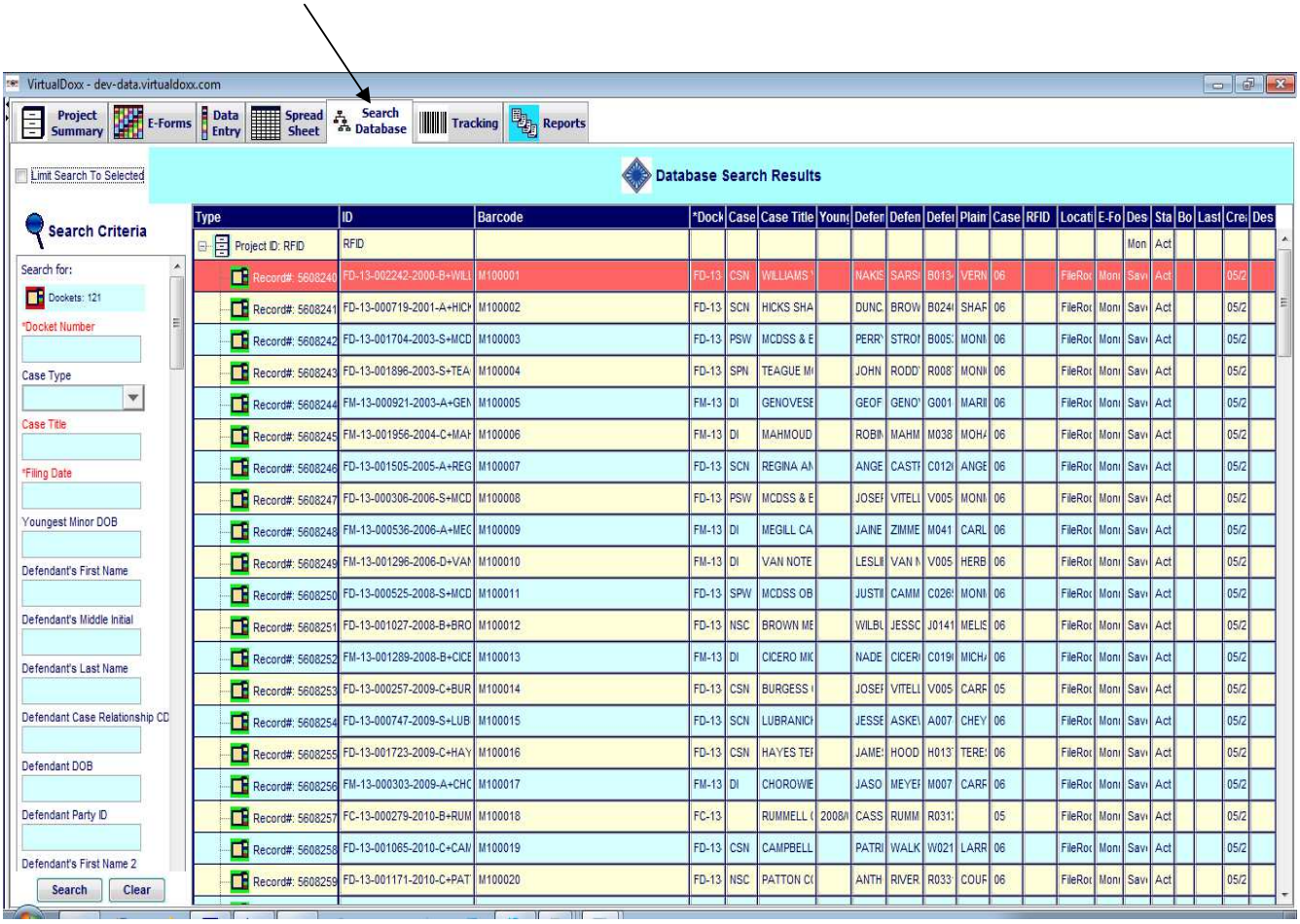
Searching the Database:

To search the database for records, complete the following instructions:

1. Navigate to the "**Search Database**" tab.
2. Enter your search criteria in the correct fields, meta-data fields or any combination thereof
3. Searches can include start date, end date or date range
3. Click the "**Search**" button.

NOTE: Use % for wildcard searches. For example, if you are searching based on 'customer last name', a col% will return all records that start with the entered chatacters (such as "col"), a %col will return all records that end in "col", %col% will return all records containing "col" any where in the selected field.

The search screen is shown below:



The above Search was for all active records, 121 records matched the search criteria. Additional data could have been selected, such as Docket Number, Filing Date, Defendant Name, etc. to drill down to the exact record desired.

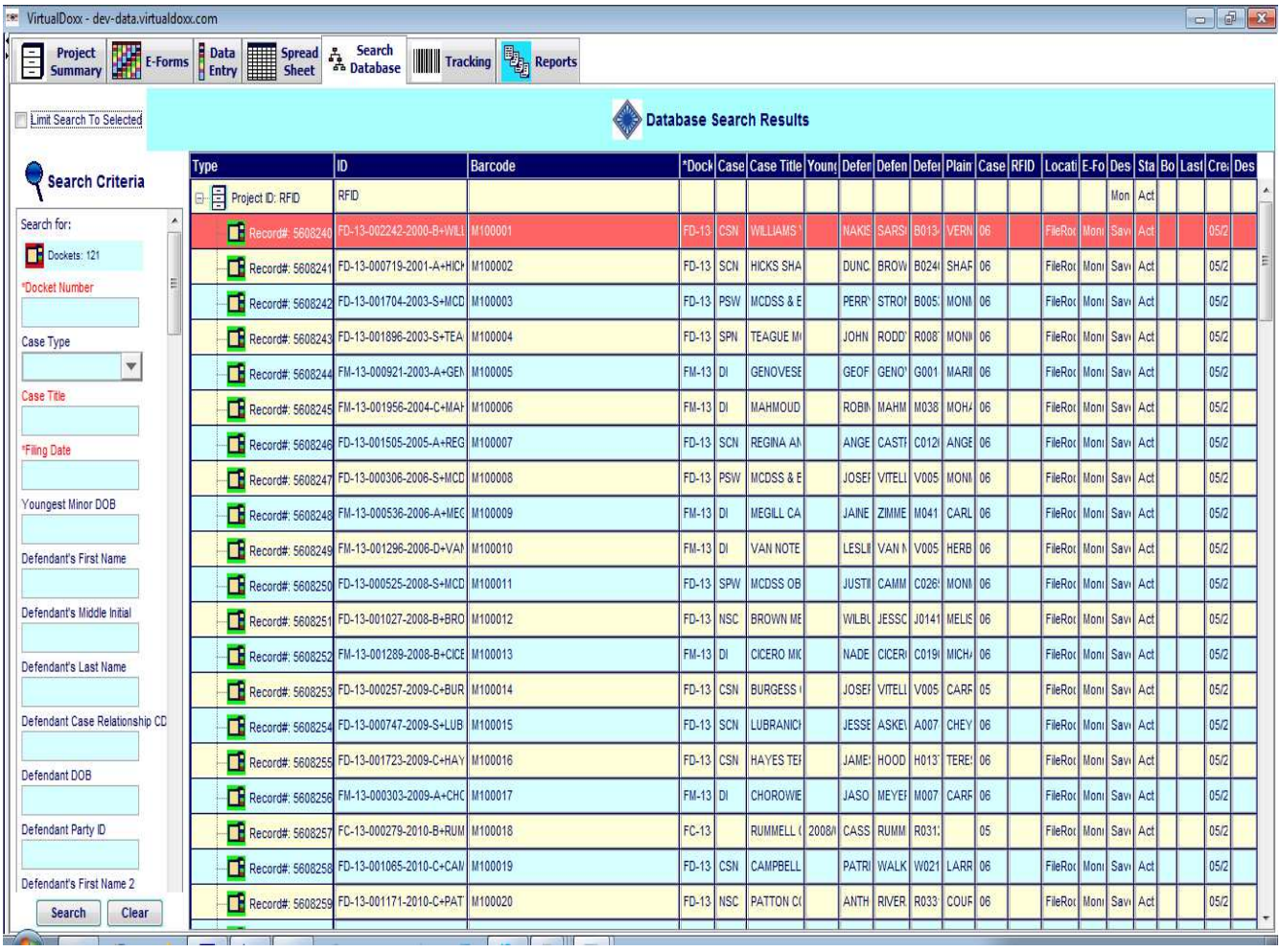
Data about each record are displayed in columns, for quick access to data elements about the record. Like a spreadsheet, column widths can be 'dragged' to expand or reduce the column width.

Record Right-Click Option:

Records can be highlighted, selected, and right-clicked from the search results to perform quick tasks as needed.

- search using desired criteria and row(s) of data will display
- left click to select one record
- to select multiple records not all grouped together, hold down 'control' button on keyboard and then left click on all records that you wish to select
- to select multiple records all grouped together, left click the top row and then hold down the 'shift' key on the keyboard and then left click on the bottom row

The above actions will highlight in RED one or multiple records. Now right click anywhere within the RED rows, to display the 'action list' for the record or records selected.



When right-clicked records will display the following menu:

View Record:

This is a text view of data and meta-data. However, double-clicking the record provides a more expansive data view, so View Record is not often used.

Update Record Status:

Displays status values and enables record status updates. However, this task is most commonly performed using the Tracking screen.

Transfer Record:

Displays destination values and enables a single record to be transferred. However, this function is most commonly performed using the Tracking screen.

Queue Record for Print:

Will automatically place the record in the print file folder label queue. This is only used if records are added to the database without a label being printed, and file room staff need to print a label for the record.

Queue Record:

This is the most common use of the 'Right Click'. A list of available Queues displays, and the desired Queue can be selected. The record will be placed in the selected Queue for subsequent processing.

UnQueue Record:

This deletes a record from a Queue. However, this is more commonly performed on the spreadsheet screen or the project summary panel (discussed subsequently).

Email Record:

Enables entry of one or more email addresses to email a text view of data and meta-data elements.

Request Record:

Places record in Request Queue and triggers appropriate email notifications. However, record requests are normally performed by office workers using the Casual User Interface (discussed subsequently).

The most common 'action' is to put records into a Queue. Selecting the 'Queue Record' option will display a list of available Queues. The desired Q can be selected from drop-down list, and all records highlighted in Red will be added to the Queue selected. The Q selected can be opened from the Spreadsheet screen and any column can be left clicked to sort the rows by the column field clicked. For example, clicking on a column = bar code #, the rows of data will be in sequence in ascending order; clicking the column heading again will reverse the order.

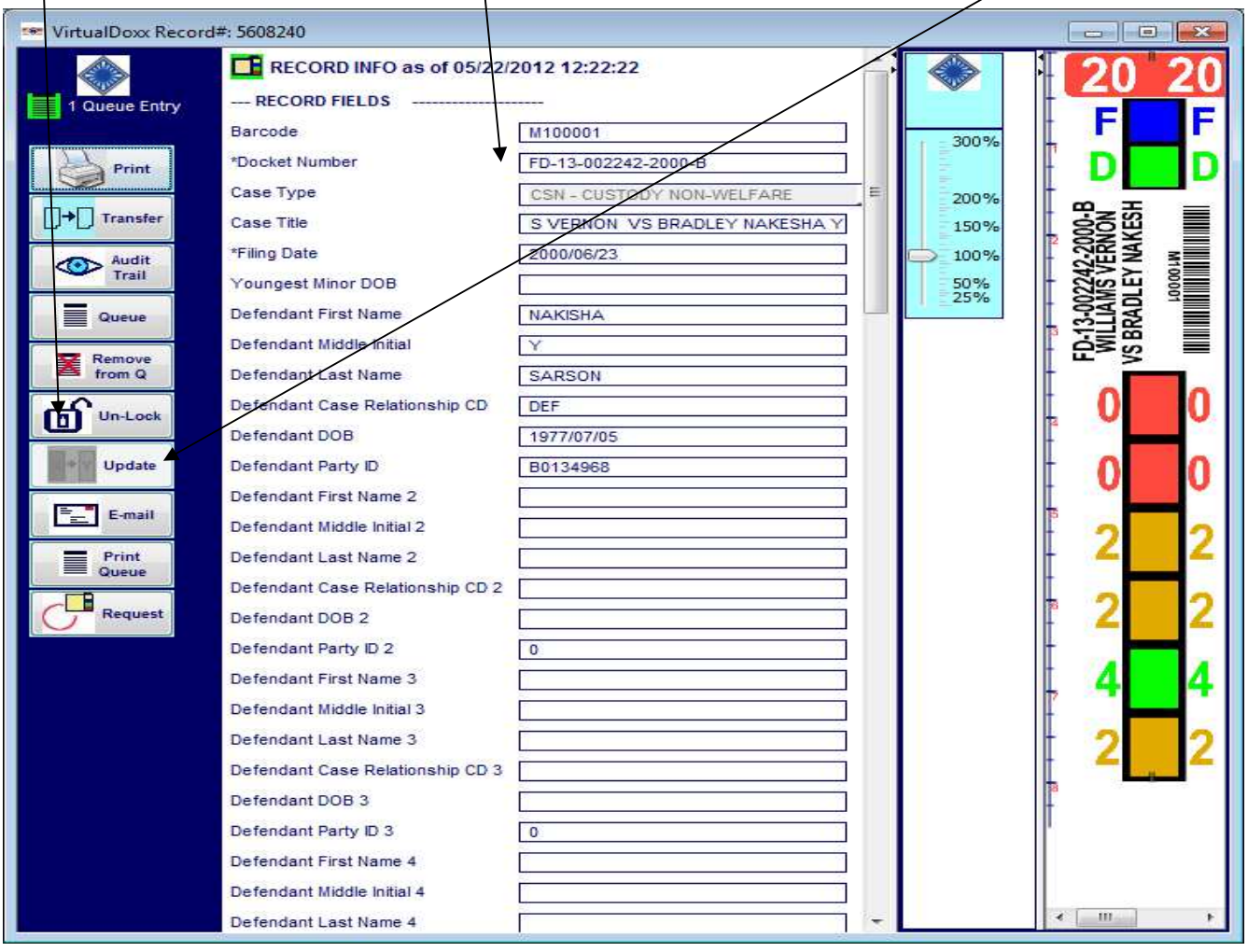
To VIEW a Single Record, Update the Record, Take Actions on the Record, or View AUDIT TRAIL / HISTORY of the Record

- once you have searched using the Search screen and row(s) of data have been returned (for Records meeting the Search Criteria), you may double click a Record to view all of its Data and Meta-Data. Once you have viewed a Record, you can go back to the Search results to double click any other rows(s) that you wish to view

- you may click the Unlock button (if you have administrative rights to do so) and you may update any data or data fields, such as name change, status, location, box # and/or you can update the date(s) that a record is due for Archiving and/or Destruction, etc.

- when you have completed the Record Update, click the 'Update' Button

Unlock To Update Fields Update Data & Meta-Data/Fields Update to Save Changes



- click on **Calendar Icon** and/or use Keyboard to enter Archive and/or Destruction dates to manually apply retention scheduling

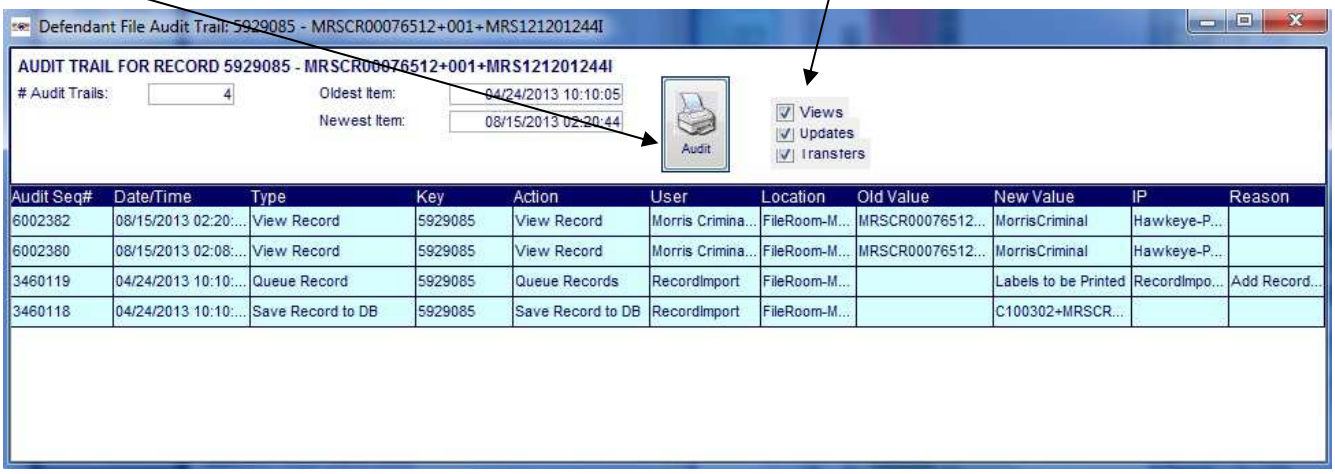
Chain-of-Custody Report / Audit Trail

Once a record has been double-clicked, as shown above, the **Audit Trail** button can be clicked to display a complete history of the record, including:

- each time the record has been viewed
- each time the record has been updated
- each time the record has moved (been transferred)

Example Audit Trail:

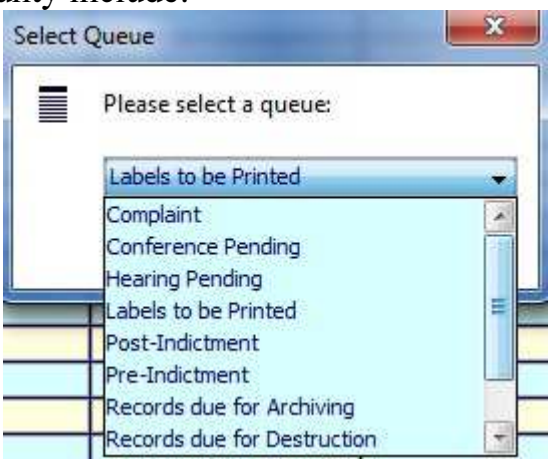
The Audit Trail can be filtered to see only views and/or udpates and/or transfers. The audit trail can be printed.


Defendant File Audit Trail: 5929085 - MRSCR00076512+001+MRS121201244I
AUDIT TRAIL FOR RECORD 5929085 - MRSCR00076512+001+MRS121201244I
Audit Trails: 4
Oldest Item: 04/24/2013 10:10:05
Newest Item: 08/15/2013 02:20:44
Audit
Views
Updates
Transfers
Audit Seq# Date/Time Type Key Action User Location Old Value New Value IP Reason
6002382 08/15/2013 02:20:... View Record 5929085 View Record Morris Crimina... FileRoom-M... MRSCR00076512... MorrisCriminal Hawkeye-P...
6002380 08/15/2013 02:08:... View Record 5929085 View Record Morris Crimina... FileRoom-M... MRSCR00076512... MorrisCriminal Hawkeye-P...
3460119 04/24/2013 10:10:... Queue Record 5929085 Queue Records RecordImport FileRoom-M... Labels to be Printed RecordImpo... Add Record...
3460118 04/24/2013 10:10:... Save Record to DB 5929085 Save Record to DB RecordImport FileRoom-M... C100302+MRSCR...

The audit log can be printed, and will display the signature, if a signature exists for the row of data.

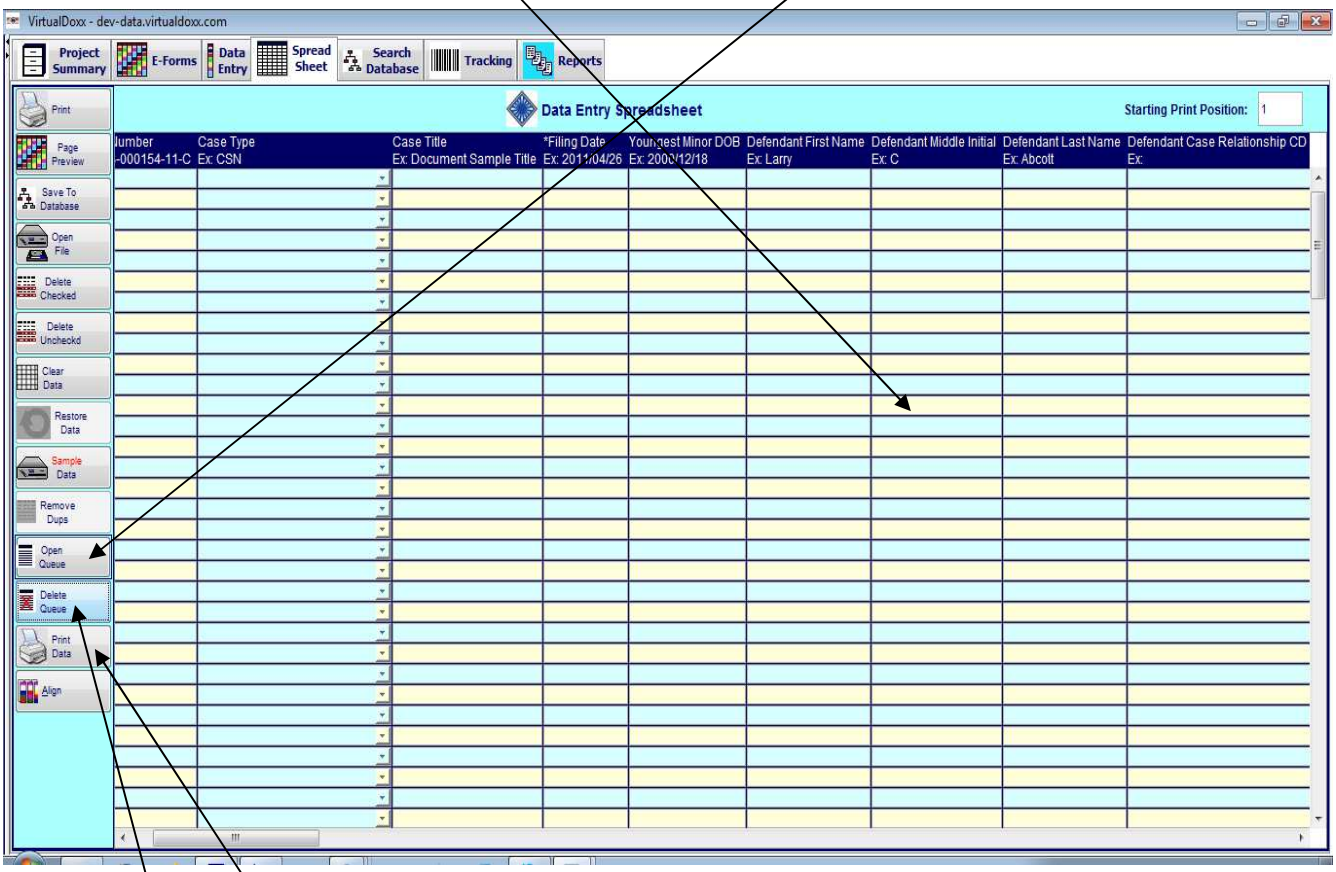
Processing Queues

Queues are a 'placeholder' for records that require action or processing. The Queues established for Morris County include:



- **Complaint**
- **Conference Pending**
- **Hearing Pending**
- **Labels to be Printed**
- **Post-Indictment**
- **Pre-Indictment**
- **Records Due for Archiving**
- **Records Due for Destruction**
- **Request Q**
- **Requested for Court**

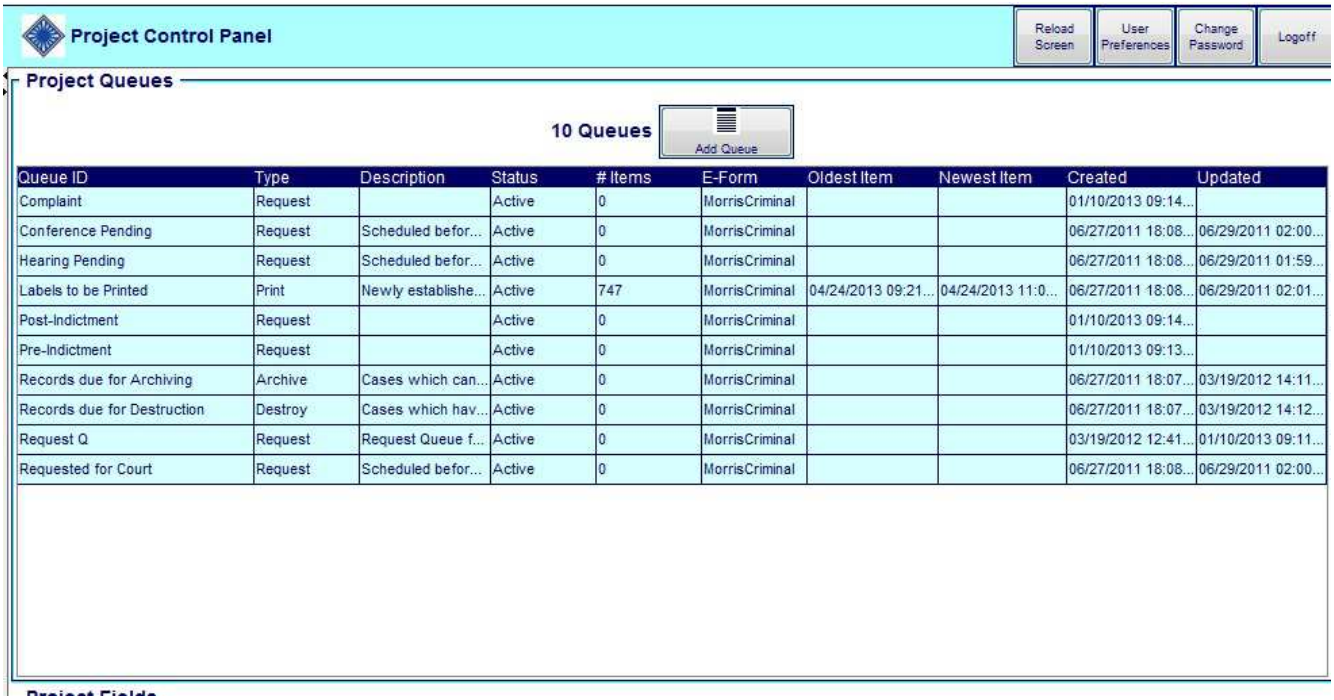
Queues can be opened using the Spreadsheet screen. Click the **Open Queue** button, and all records in the Queue will display. Clicking on any single column heading will sort the list; clicking the column heading a second time will reverse the sequencing of rows.



Clicking the **Print Data** button will print whatever is displayed in the Spreadsheet.

Clicking **'Delete Queue'** and selecting a Queue from the drop-down list, will delete a Queue.
Opening Queues using the Project Summary Panel enables more Queue functionality, including:

- ability to view a record (row) within the Queue
- ability to delete rows from the Queue
- ability to predefine 'sorting' routine of the rows, typically to print the Queue in file folder sequence (when printing the Request Queue)
- ability to print the Queue as rows of data and/or
- ability to print a customized 'cover page' for each row in the Queue

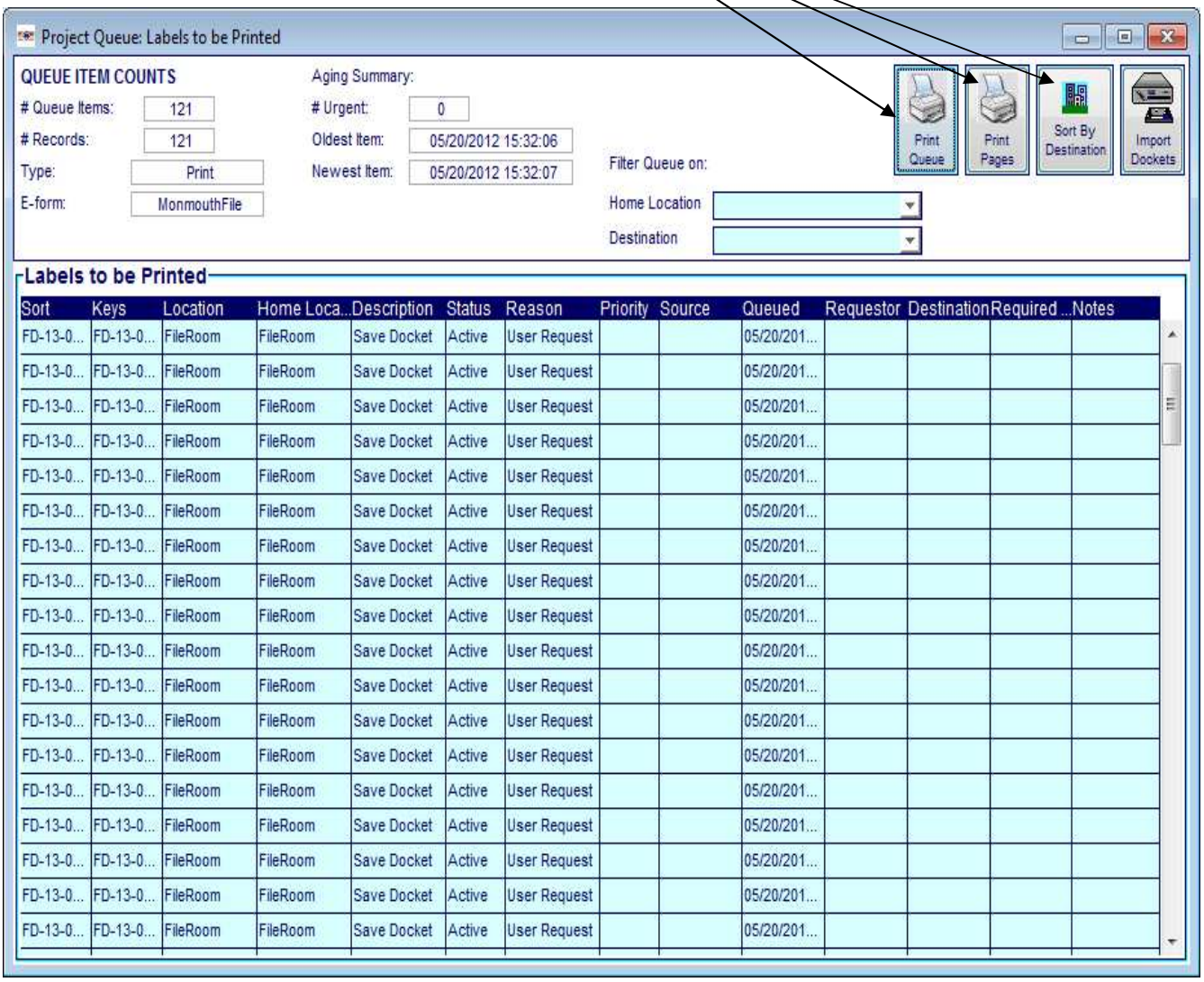


Queue ID	Type	Description	Status	# Items	E-Form	Oldest Item	Newest Item	Created	Updated
Complaint	Request		Active	0	MorrisCriminal			01/10/2013 09:14...	
Conference Pending	Request	Scheduled befor...	Active	0	MorrisCriminal			06/27/2011 18:08...	06/29/2011 02:00...
Hearing Pending	Request	Scheduled befor...	Active	0	MorrisCriminal			06/27/2011 18:08...	06/29/2011 01:59...
Labels to be Printed	Print	Newly establishe...	Active	747	MorrisCriminal	04/24/2013 09:21...	04/24/2013 11:0...	06/27/2011 18:08...	06/29/2011 02:01...
Post-Indictment	Request		Active	0	MorrisCriminal			01/10/2013 09:14...	
Pre-Indictment	Request		Active	0	MorrisCriminal			01/10/2013 09:13...	
Records due for Archiving	Archive	Cases which can...	Active	0	MorrisCriminal			06/27/2011 18:07...	03/19/2012 14:11...
Records due for Destruction	Destroy	Cases which hav...	Active	0	MorrisCriminal			06/27/2011 18:07...	03/19/2012 14:12...
Request Q	Request	Request Queue f...	Active	0	MorrisCriminal			03/19/2012 12:41...	01/10/2013 09:11...
Requested for Court	Request	Scheduled befor...	Active	0	MorrisCriminal			06/27/2011 18:08...	06/29/2011 02:00...

Clicking on a Queue will display rows for all records in the Queue. These actions are available:

The buttons along the top of the window enable printing the rows of data and/or cover sheets for each row. As well, if records in the Queue are being routed to destination(s), the rows can be sorted by destinations.

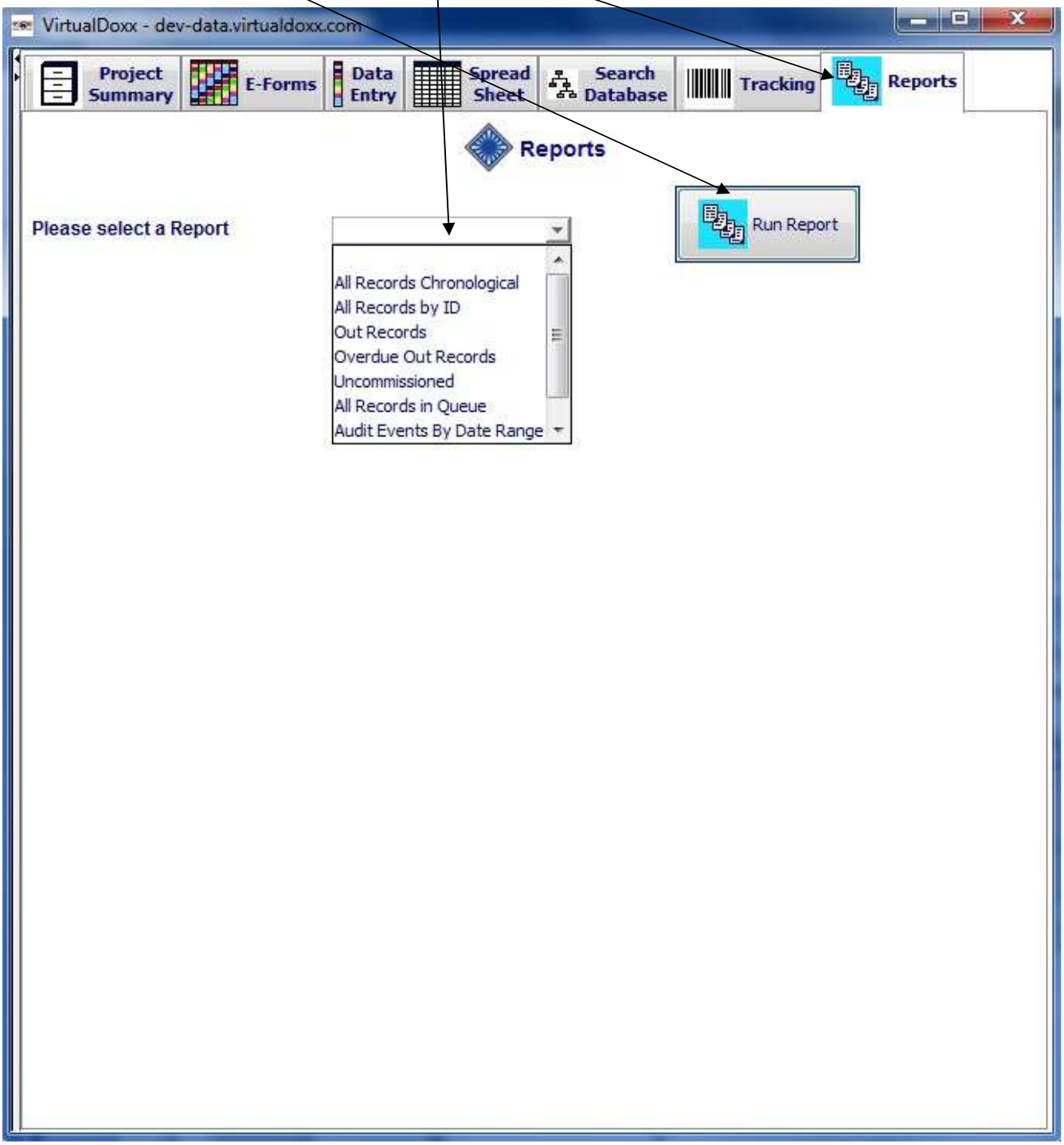
Queue processing buttons, as described:



Running Reports:

Reports can be accessed and used by following the below instructions:

1. Navigate to the "**Reports**" tab.
2. Select a report to run from the drop-down menu.
3. Click "**Run Report**"



Reports can be viewed in rows of data in .csv or .html format. If the computer opening the report has Microsoft Excel, the report can be right-clicked to export to Excel.

Administrative Tasks:

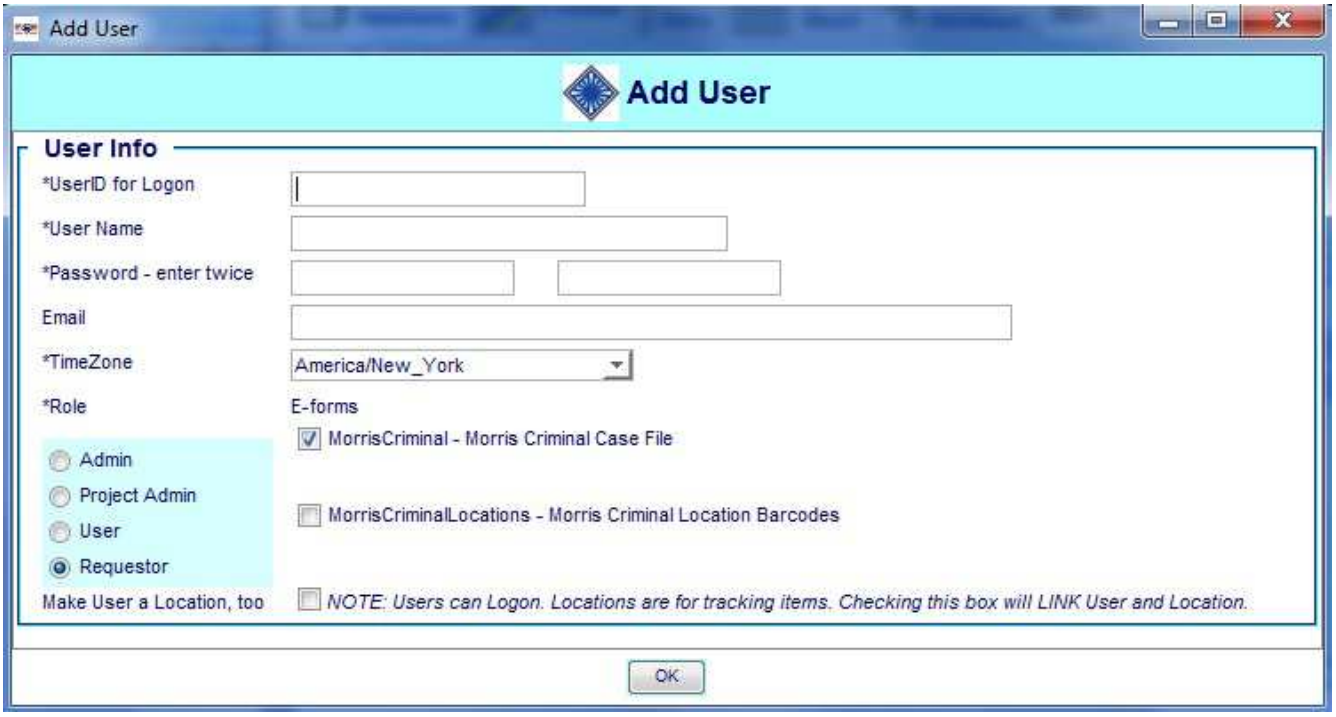
If you are an administrator you may complete the following tasks, but first navigate to the "**Project Summary**" tab:

Adding a New User:

Please Note: New users are automatically created via Active Directory Logins on Morris County host system. This section is for informational purposes only.

1. From the Project Summary tab, click "Add User".
2. Enter a new UserID, name, password, and email.
3. Select the users role.
4. Select the users Layout access.
5. OPTIONALLY make user a location at the same time.

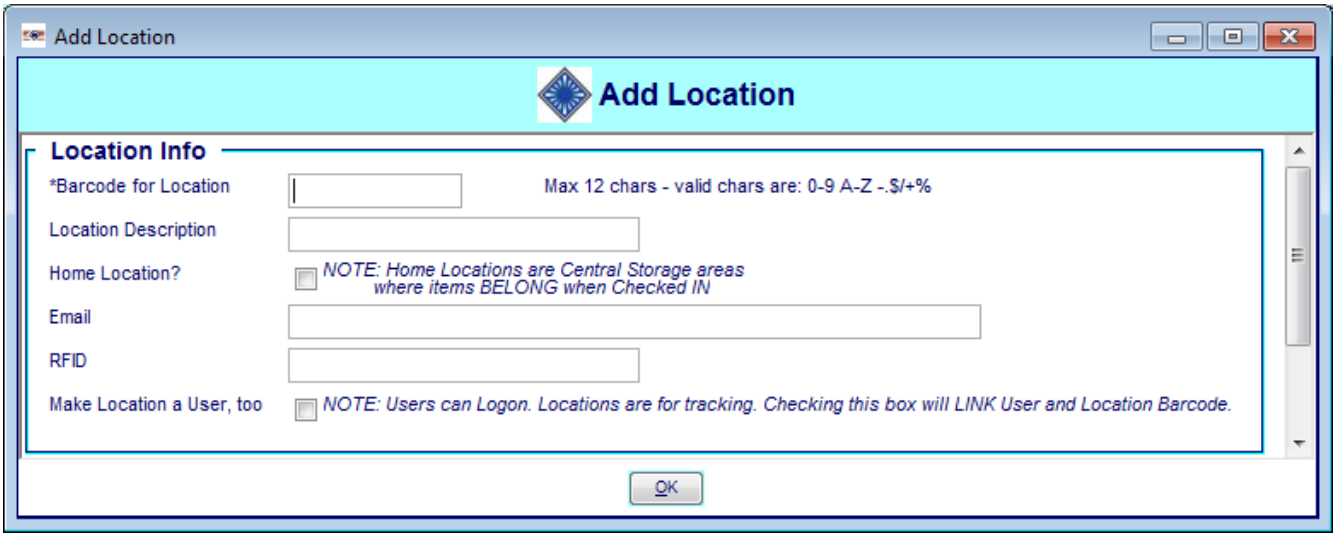
The Add User window can be see below:



Adding a New Location:

1. From the Project Summary tab, click "Add Location".
2. Enter the location's barcode and description.
3. If the location is a Home Location, such as the File Room, check the check box.
4. OPTIONALLY make location a user at the same time.

The Add Location window can be see below:


Add Location
Add Location
Location Info
*Barcode for Location
Max 12 chars - valid chars are: 0-9 A-Z -.$/+%
Location Description
Home Location?
NOTE: Home Locations are Central Storage areas where items BELONG when Checked IN
Email
RFID
Make Location a User, too
NOTE: Users can Logon. Locations are for tracking. Checking this box will LINK User and Location Barcode.
OK

Adding a New Queue:

1. From the Project Summary tab, click "Add Queue".
2. Enter the Queue's ID, E-Form, type, and description.
3. Click "OK"

The Add Queue window can be see below:

Casual User Interface Users Manual

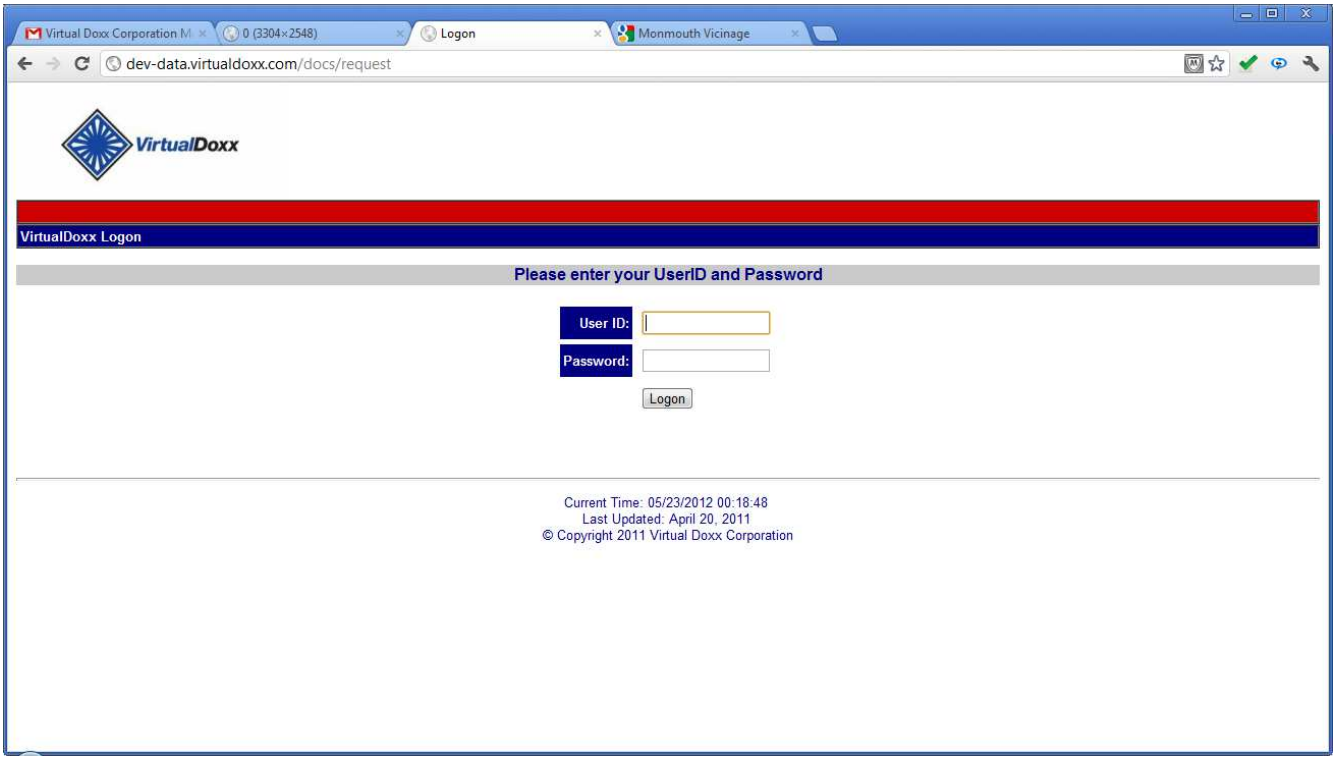
Prepared for:

Morris County Criminal

Manual Version Number	Date
1.0	08/15/13

Starting VirtualDoxx (TO SEARCH FOR RECORDS, REQUEST RECORDS AND TRANSFER RECORDS):

Log In:



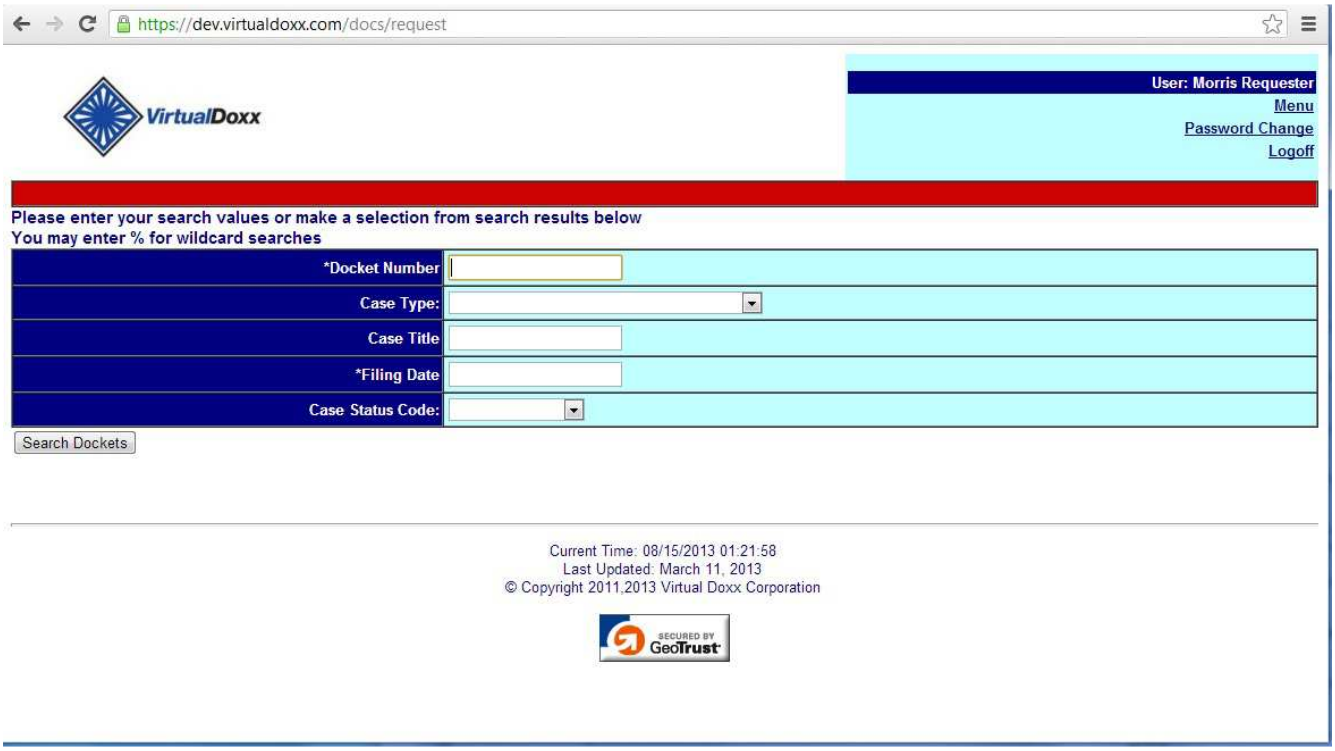
After VirtualDoxx has launched you should see the logon screen shown below.

Complete the following steps to login to and begin using VirtualDoxx:

2. Enter your UserID.
4. Enter your Password.
5. Click the LOGON button.

Once a User has logged in, an icon will automatically save to their desktop, and can be used going forward for logging on.

Once logged on a User will see the Casual User Interface SEARCH SCREEN



The Casual User Interface (CUI) includes five search fields, any or all of which can be used to query the database.

Fields can be partially entered ending with the % sign for wildcard searches.

The CUI is most often utilized by office workers to determine the location of a record.

The above example is searching on Docket Number **FD-13-002242-2000-B**. This data displays:

Request this Record	Transfer this Record	ID	Status	Location
Request	Transfer	FD-13-002242-2000-B+WILLIAMS VERNON VS BRADLEY NAKESHA Y+2000/06/23	Active	L-33-Room L-33

The User now knows the record's location and status.

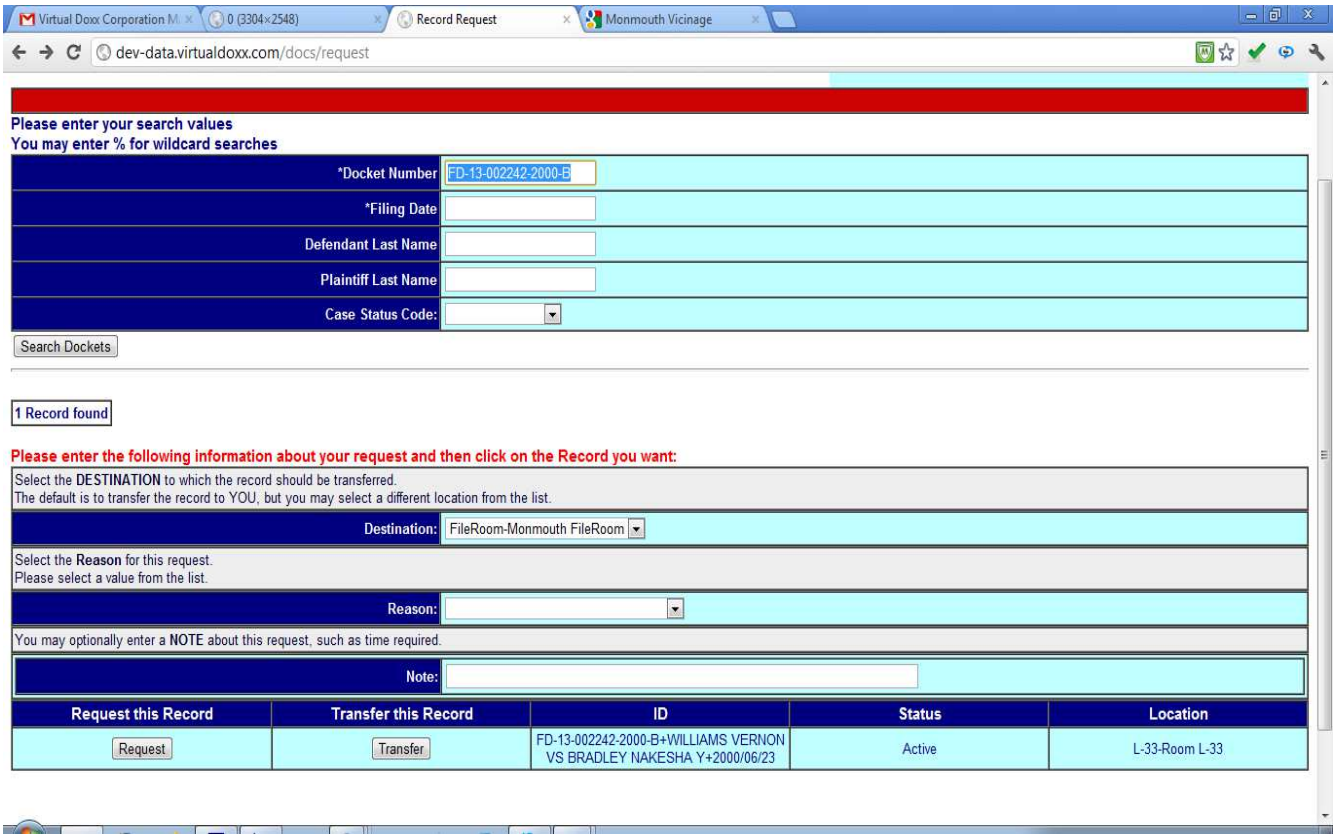
If the User clicks the **Request** button, the Record will be placed in the **Request Queue** with themselves shown as the person Requesting the Record. If desired, the **reason** for the request can be selected from the drop-down list.

If the Record is being requested for another person or place, that **destination** can be selected from the drop-down list.

For any Request, a note can be added.

All record requests:

- place record in Request Queue
- send email(s) to designated file room staff
- can also send email to the person that currently has the record



Virtual Doxx Helpdesk

Support@virtualdoxx.com

877-280-7343 (RFID) ext 3